



# How to Write an Investment Policy Statement

## (Wiley Trading)

*Rocco DiBruno*

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## How to Write an Investment Policy Statement (Wiley Trading) Rocco DiBruno

*An indispensable resource for every financial service professionals developing an IPS*

The Investment Policy Statement (IPS) is one of the most critical documents fiduciaries must draft. For years, ERISA and other industry regulations have governed the guidelines all fiduciaries must comply with when drafting one. But the current climate of corporate scandal and the 2008 global banking crisis have led to increased scrutiny by regulators, prompting firms to take a closer look at the quality and integrity of their IPSs and to take steps to have a rigorous formal process in place for drafting them. Endorsed by the Foundation of Fiduciary Studies, this concise guide provides a rigorous framework and the expert insight, information and guidance you need to guarantee that your IPS is in complete compliance with all ERISA-directed requirements.

- Provides a step-by-step plan for creating a uniform IPS that every advisor in the office can follow
- Defines the duties and responsibilities of all parties involved, while clarifying diversification guidelines and providing methods for keeping costs under control
- Packed with ready-to-use templates, sample forms, letters and other documents, diagrams and other valuable tools, including sample Policy Statement downloadable at the companion website
- Designed to get you quickly up to speed on what you need to know to confidently serve your clients with the highest standards of care and protection



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