



A Primer for Investment Trustees

By Jeffery V. Bailey, Jesse L. Phillips, Thomas M. Richards

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Let's face it. Few business assignments are more intimidating than being placed in a position of responsibility outside your area of expertise. Surrounded by subject matter experts awaiting your direction, you find yourself actually expected to make decisions. Even though you are told coming in that there are no dumb questions, you don't want to provide the exception to the rule. A multitude of technical reports full of unfamiliar and complex concepts are quickly thrown at you. Your real day job keeps you busy and offers few opportunities for learning about your new position. So you sit silent at meetings, lacking confidence, frustrated and concerned about your ability to contribute productively. Well, welcome to the world of the newly appointed investment trustee. From the start, we want to put your mind at ease on one critical point: extensive investment expertise is not required for you to serve effectively in a trustee role. Nevertheless, for you to exercise good judgment in making decisions, you should possess at least a working understanding of basic investment principles and concepts. We believe that you can acquire this knowledge with a modicum of effort. The purpose of this monograph is to provide trustees, particularly if they are new to their positions, with a primer that will help them begin to successfully fulfill their responsibilities.

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