

Trustee Investment Powers: The Prudent Investor Rule

OVERVIEW: THE PRUDENT INVESTOR RULE

- Since 2002, all Trustees in the Province of Alberta are subject to the Prudent Investor Rule
- Applicable to corporations, pensions, not-for profits, endowments, foundations, spousal trusts, family trusts, etc.
- The Prudent Investor Rule is the legal application of Modern Portfolio Theory and is based on the concept of efficient diversification

THIS PRESENTATION EXPLORES:

- The application of the Prudent Investor Rule & Modern Portfolio Theory
- Understanding risks and avoiding liability through prudent investment policies
- Case law, court decisions, and the implications for Trustees

ABOUT CHRIS TURNBULL

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Author of the paper "Trustee Investment Powers: The Higher Standards of Prudence"

Guest Lecturer: Edmonton Estate Planning Council, Society for Trust and Estate Practitioners (STEP), The Canadian Bar Association



COMMENTS & FEEDBACK

"You gave an amazing, high quality presentation. The feedback on the website was entirely positive and complimentary. I hope that you use it on other occasions as well."

Yolanda Van Wachem,
McLennan Ross LLP, Chair STEP
(Edmonton)

"The topic and the presenter were excellent"

"Very well prepared speaker with erudite review of history of prudent investor rule, and well chosen video clips, to boot."