

THE FIDUCIARY AND INVESTMENT RISK MANAGEMENT ASSOCIATION
AUDIT ISSUE MANAGEMENT AND REPORT WRITING
MAY 1, 2023
Anthony M. Palma, CAMS, CFE, CFSA

In today's seminar, Financial Services professionals will learn how to inform and influence their clients, stakeholders and management by writing clearly and concisely.

- I **Program Objective/Overview**
 - a. Strategy
 - b. Objective
 - c. Organization
 - d. Style
 - e. From the Experts

- II **Strategy**
 - a. The Message to the Audience

- III **Objective**
 - a. The What and Why of Reporting

- IV **Organization**
 - a. How Reader's Read What Writer's Write

- V **Style**
 - a. Report Writing Pitfalls

- VI **Success in Report Writing**
 - a. Four short exercises