

Refund Policy

Effective Date: April 2026

At The Fiduciary Institute, we are committed to providing high-quality educational programs and training for fiduciary professionals. We want you to feel confident in your enrollment. This Refund Policy applies to all courses, programs, and digital products purchased through our learning platform at learn.thefiduciaryinstitute.com (hosted by Thinkific).

By completing your enrollment, you acknowledge that you have reviewed and agree to the terms of this Refund Policy.

1. Online Courses and Digital Products

Because digital course materials and downloadable content are accessible immediately upon enrollment, all sales are generally final.

However, we offer a 7-day satisfaction guarantee for online courses. If you are not satisfied with your enrollment, you may request a refund within 7 calendar days of purchase, provided you have not completed more than 25% of the course content.

2. Live Training Programs, Webinars, and Workshops

- Refunds for live or scheduled programs (in-person or virtual) may be requested up to 14 calendar days before the scheduled start date.
- If you cancel within 14 days of the start date but before the program begins, you may be eligible for a credit toward a future program in lieu of a refund.
- No refunds or credits will be issued once a live program has started.

3. Memberships or Subscriptions

If applicable to your enrollment:

- Subscription payments (monthly or annual) are non-refundable once charged.
- You may cancel your subscription at any time to prevent future billing.
- Access to course content and materials will remain available through the end of your paid billing cycle.

4. Exceptional Circumstances

Refund requests outside the timelines described above may be considered on a case-by-case basis in situations such as documented technical issues preventing access, duplicate charges, or other extenuating circumstances.

5. How to Request a Refund

To request a refund, please contact us at:

Email: support@thefiduciaryinstitute.com

Phone: 503-389-0510

Please include the following in your request:

- Your full name
- The email address associated with your account
- Date of purchase
- Order or enrollment confirmation number
- Reason for your request

Approved refunds will be processed to the original payment method within 10 business days.

6. Changes to This Policy

The Fiduciary Institute reserves the right to update or modify this Refund Policy at any time. Changes will be posted on this page with a revised effective date. Continued enrollment or purchase after any update constitutes acceptance of the revised policy.