Trustee Training Directory 2026

The Need for Trustee Training

Helen Forrest Hall APMI
Chief Strategy Officer
PMI

The pressures on trustees to ensure that they are fully prepared for their role are greater than ever. From the initial appointment, trustees are required to undergo training within six months and every two years thereafter. This Trustee Training Directory has been designed to support trustees in meeting those requirements by bringing together a broad range of high-quality training opportunities in one place.

Compiled by the PMI in association with other reputable training providers across the sector, the directory highlights courses suitable for new trustees and those looking to refresh their knowledge, covering key areas such as legal, regulatory, investment and scheme-specific learning. It is intended to act as a practical starting point for trustees seeking to build confidence, capability and effectiveness in their role.

As the professional institute for the pensions sector, the PMI also supports trustee development through its wider learning offer, including structured routes such as the Pensions Trusteeship pathway and programmes like the Trustee Accelerator Programme (TAP), which complement the external provision featured within this directory and reflect different stages of a trustee's learning journey.

We hope this Trustee Training Directory helps you identify the right support and opportunities for your ongoing development. Please get in touch if you would like to see additional topics or training sessions included in future editions.

PMI 50TH ANNIVERSARY

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Pensions Management Institute (PMI)

The PMI is home to the largest pensions network in the UK, where we support and develop trustees and pensions professionals who run UK schemes.

Courses overview

The PMI Training Sessions are an intensive period of study in a current topical area. They're relatively quick to complete and are directly related to specific and contemporary issues in the Pensions Sector.

We're experienced in providing courses that are recognised by the Pensions Sector and regularly reviewed by relevant professional sector experts, so the learning you undertake will always be relevant to your needs.

FIND OUT MORE ABOUT OUR TRAINING HERE

Courses offered:

Course title	Date	Summary	For who?	Price
Trustee Workbench London	13 May 2026 9:00–13:45 *Mayer Brown LLP, 201 Bishopsgate EC2M 3AF, London*	This training offers a series of focused training sessions on the topics that matter most to your role. The programme gives you practical insights to support your governance, compliance and decision-making, helping you strengthen your knowledge and manage your scheme with confidence. By concentrating on key areas of trustee responsibility, Trustee Workbench equips you with the tools and understanding you need to carry out your duties effectively.	Professional trustees Lay trustees	**PMI trustee members:** Free **Non-members** £375 (+VAT) *If, as a non-member, you are interested in joining, email us at **events@pensions-pmi.org.uk**, we will contact you in April if any places are available.*
Cyber security London	15 September 2026, 9:00–17:00 *Crowe, Ludgate Hill, London*	To equip pension professionals with the knowledge and skills needed to navigate the evolving landscape of cyber risk.	Pension scheme managers, trustees, lawyers, actuaries administrators, HR, policy advisers, consultants, corporate IFAs, investment managers, financial directors, communications financial directors	**PMI members** £499 (+VAT) **Non-members** £749 (+VAT)
Excelling in trustee culture leadership for future readiness London	22 Sept 2026 9:30–16:30 *20 Gresham Street, London, EC2V 7JE*	A uniquely tailored programme that puts culture at the heart of good trusteeship and is designed to help trustees navigate the growing demands of their role and be successful. It equips trustees to steer a course around trustee board dynamics and develop a mindset and skill set to have impact on issues of importance. This involves practical case-based training helping trustees who want to make a difference and be effective in influencing within a trustee board and with key suppliers and stakeholders. The course brings together pensions and leadership expertise with practical application tools.	Trustees, chair of Trustees and secretary to the trustees	**PMI trustee members:** £699 (+VAT) **Non-members** £799 (+VAT
Secretary to the Trustee (Basic) Online: Zoom	19–21 October 2026	An online series designed for those with little or no pension trustee knowledge. Our expert panel will talk you through the essentials of the role. From outlining the best practice approach to managing conflicts of interest and a risk register. We'll share our insights and help you work effectively with the Chair and Board of trustees, as well as answer any questions you have about the pensions industry and trusteeship generally.	Secretary to the trustees – new to the role	**PMI members** £45 (+VAT) per session/£400 (+VAT) all sessions **Non-members** £60 (+VAT) per session £550 (+VAT) all sessions for non-members
Secretary to the Trustee (Advanced) Online: Zoom	22–23 October 2026	An online series designed for those who have some understanding of pensions and trusteeship but need to improve their knowledge to a more advanced level than our Introduction to Secretary to the Trustee workshop. Our expert panel will talk you through the advanced requirements of the role. From outlining employer covenant to DB scheme journey planning and managing advisers.We'll share our insights and help you work effectively, as well as answer any questions you have about the pension industry and wider trusteeship.	Secretary to the trustees	**PMI members** £45 (+VAT) per session £280 (+VAT) all sessions **Non-members** £70 (+VAT) per session £500 (+VAT) all sessions
Trustee Workbench Edinburgh	4 November 2026	Half-day training exclusively for pension scheme trustees, offering valuable insights and practical knowledge to enhance their governance, compliance, and decision-making capabilities.	Professional trustees, lay trustees	**PMI members** Free **Non-members** £375 (+VAT)

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Aon

Aon is a leading global professional services firm providing guidance in risk, retirement and pensions (defined benefit and defined contribution), investment, insurance and health solutions. Operating in over 120 countries, Aon delivers data-driven insights and advisory services to help clients manage risk and achieve better outcomes worldwide.

New trustees are given six months to develop the necessary knowledge and skills, but with so much information to absorb, the task can feel daunting. The pensions environment is a continually evolving field, so even once you are comfortable with the fundamentals, there is always more to learn.

To support you, Aon offers a range of training courses covering both Defined Benefit and Defined Contribution pensions:

Defined Benefit

Both Parts are aimed for new trustees, those with other pension scheme responsibilities or those needing a refresher.

- **Defined Benefit Part 1** – covers the responsibilities of trustees and an introduction to investment strategy and asset classes.
- **Defined Benefit Part 2** – provides a practical look at the key issues and decisions that defined benefit schemes now face.

* *Delegates are welcome to attend a Defined Benefit – Part 2 course before later attending the Defined Benefit – Part 1.*

Defined Contribution

- **Defined Contribution** – for trustees of a defined contribution trust-based scheme or a hybrid scheme with a defined contribution section.
- **Pension Governance Committee** – for those who have a role in contract-based and master trust arrangements.

Check out our **brochure** for more information on the courses we provide and for other resources available to help you.

Location: London and virtual

Frequency: Courses are scheduled throughout the year

Bespoke courses: Arranged upon request

If you have any specific needs, please get in touch at pensionstraining.enquiries@aon.com

Part of HOWDEN

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Barnett Waddingham

Barnett Waddingham is a leading UK professional services consultancy at the forefront of risk, pensions, investment and insurance, trusted by clients across the public and private sectors.

Barnett Waddingham's online DB Trustee Training provides a practical grounding in pension scheme governance for both new trustees and those seeking a refresher.

Delivered over three morning sessions, the course covers key pensions matters and is designed to help delegates build the knowledge and confidence needed to complete The Pensions Regulator's Trustee Toolkit. It offers a clear, structured introduction to the responsibilities and expectations of trustees in an accessible online format.

We also offer DC Pensions Training, delivered over two focused online mornings, for employers, trustees and others involved in DC arrangements who want a practical understanding of governance, responsibilities and good member outcomes.

Courses offered:

DB Trustee Training	barnett-waddingham.co.uk/db-trustee-online-training-sessions
DC Pensions Training	barnett-waddingham.co.uk/dc-pensions-online-training

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Website: www.firstactuarial.co.uk

First Actuarial

We work with employers and trustees, bringing expert guidance and service tailored to Defined Benefit and Defined Contribution pension schemes.

We provide the right blend of actuarial, consultancy, administration and investment services for every scheme we work with, building long-term relationships based on trust.

Our course convenors are pensions professionals with extensive experience of the industry. This really comes across in their training sessions, and means that they can explain complex issues in simple and straightforward ways.

They will also encourage informal discussion and exchange of ideas to help you benefit from the experiences of other scheme trustees.

We offer both in-person and online courses across a range of topics:

Courses offered:

Introduction to trusteeship
Investment training for trustees
Defined Contribution training
Current issues
Bespoke courses

Example topics of our webinars:

Introduction to trusteeship
Defined Contribution training
Investment training for trustees
Investment training for trustees
Key issues for year-end pension cost accounting disclosures
Current issues for LGPS employers
Current pension issues for independent schools
Current pension issues for housing associations
The latest from the risk transfer market

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Just Group

Just (Just Group plc), part of Brookfield Wealth Solutions, is a UK financial services company and a specialist in defined benefit (DB) de-risking, individual retirement income, and care markets.

For many DB schemes, the real work starts after an insurer solution is secured. Data cleanse, GMP equalisation, transition and onboarding can quickly become a bottleneck, taking longer than anticipated and stretching capacity. As the BPA market grows, delivering a smooth post-transaction experience is a key challenge. These Trustee-focused sessions will aim to share technical and practical insights on navigating data cleanse and GMP equalisation in the run up to buy-out. Free for any trustees and eligible for 2 hours CPD.

Courses offered:

Lifting the lid on the de-risking journey **Glasgow**	Thursday 4 June, 09.30-12:00 Venue TBC
Lifting the lid on the de-risking journey **Manchester**	Wednesday 17 June, 09:30-12:00 Treehouse Hotel Manchester
Lifting the lid on the de-risking journey **Birmingham**	Monday 22 June, 09:30 – 12:00 The Grand Hotel, Birmingham
Lifting the lid on the de-risking journey **London**	Tuesday 30 June, 14:00 – 17:00 Brewers' Hall, London

MAYER | BROWN

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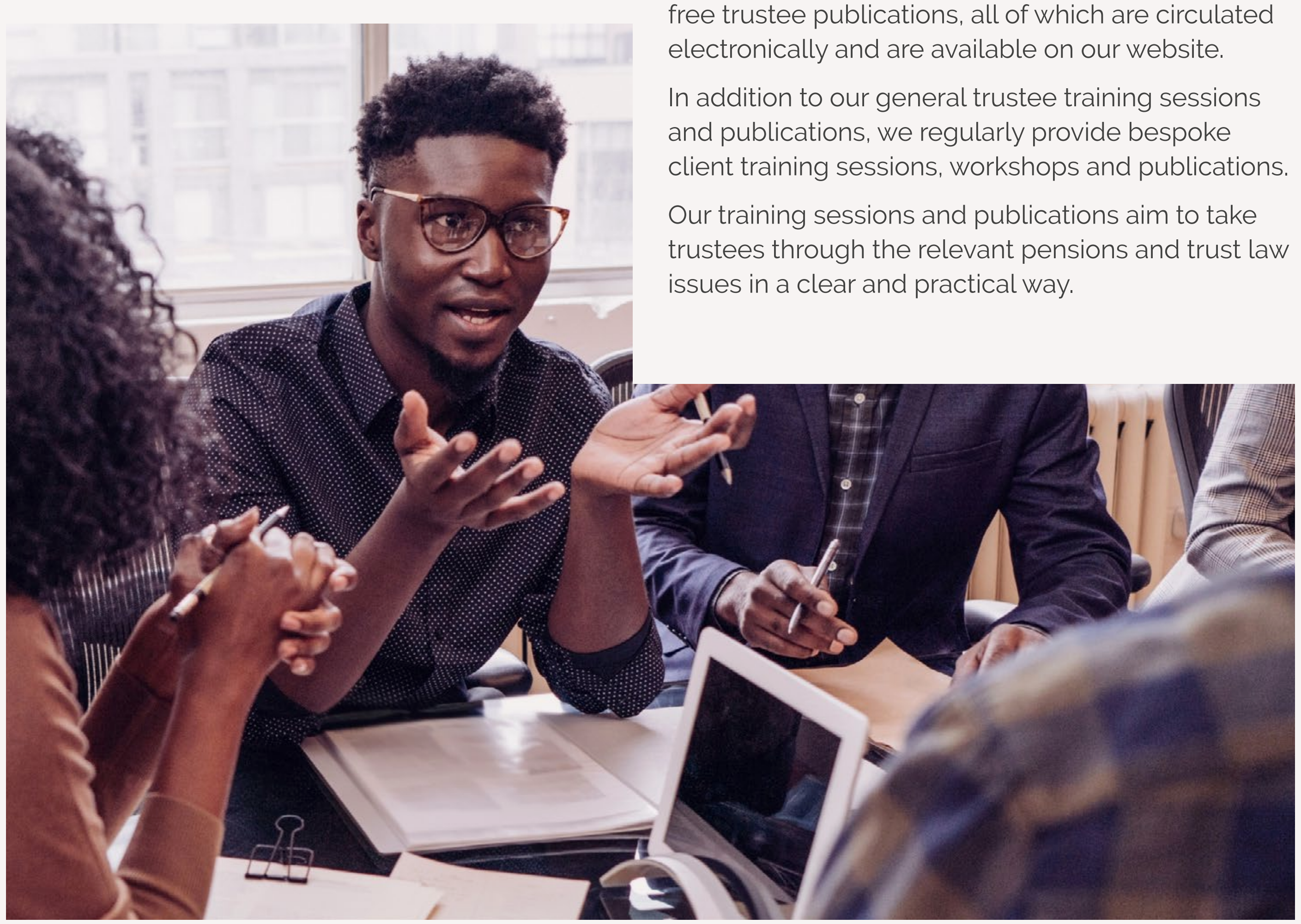
Mayer Brown International LLP

Mayer Brown is a full-service international law firm. Our market-leading UK Pensions Group advises trustees and employers on all aspects of occupational pension scheme provision.



We provide a range of free trustee training sessions for new trustees and those seeking to maintain or refresh their knowledge. The sessions are recorded in advance, and the recordings are circulated to those who have registered an interest in receiving them. This approach enables recipients to watch the recording as and when they choose and to refer back to it if necessary. We also offer a range of free trustee publications, all of which are circulated electronically and are available on our website.

In addition to our general trustee training sessions and publications, we regularly provide bespoke client training sessions, workshops and publications.

Our training sessions and publications aim to take trustees through the relevant pensions and trust law issues in a clear and practical way.

Courses offered:

Foundation Course	This session takes trustees through the pensions landscape and the key legal principles relating to DB and DC schemes.
Building Blocks Classes	These sessions give trustees a more in-depth understanding of key areas of pensions and trust law. Each class considers a specific issue or area that trustees will encounter in practice, for example trustee decision-making, DB funding, DC governance, and member communications.
Webinars	These sessions cover issues of current importance to trustees and employers. Recent topics have included third party administrators, moving to buy-in, the General Code, and employer covenant and restructurings.
Bespoke training sessions	Bespoke training sessions tailored to a client's specific circumstances and requirements are available on request. These can be held online or in person.
The Pensions Brief	A monthly publication providing headline summaries of the latest issues affecting schemes, guidance on any action to be considered or taken, and a timeline of future developments.
Legal updates	Short ad hoc e-alerts explaining important developments which may require action.
Trustee Guide	A user-friendly summary of the pensions law and regulatory framework within which trustees operate. The Guide is updated annually.

Sackers

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Sacker & Partners LLP

Sackers is the UK's leading specialist law firm for pension scheme trustees, employers, corporate investors and providers. We are celebrating our 60th anniversary, reflecting six decades of building deep expertise across the pensions industry.

We offer a wide range of training sessions, suitable for new trustees and those who want to refresh their knowledge. Led by senior lawyers who draw on their experience of advising over 400 occupational pension schemes of all sizes and structures, the in-person and online sessions are practical and engaging. We pride ourselves on delivering training which is appropriately tailored to each individual's knowledge and experience, helping the recipient move forward regardless of their level of technical understanding. All the courses we deliver are free and provide opportunities to learn, ask questions and share ideas among peers on best practice.

Courses offered:

Quarterly Legal Updates	Our online Quarterly Legal Updates provide an essential overview of significant legal and regulatory developments affecting occupational pension provision in the UK.
Pensions for new trustees	This popular in-person session focuses on the key legal issues for new trustees of DB, DC and hybrid schemes. We hold this session each year and divide the day into three parts: an overview session on the current legal and regulatory framework and how this impacts the role and responsibilities of trustees; a DB session on the scheme funding regime, covenant issues, ESG factors and endgame planning; and a DC session on investment, retirement choices and member communications.
Hot topics	Hot topic sessions on key developments such as small pot proposals, dashboards, legislation affecting trustees, and DB surplus options.
"How to" sessions	"How to" sessions on preparing for risk transfer transactions, dealing with member cases and getting to grips with the new dashboard regulations.
Bespoke courses	Bespoke courses tailored to your requirements and available upon request.

SQUIRE PATTON BOGGS

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Squire Patton Boggs

Squire Patton Boggs is a full-service global law firm. Our top ranked, award winning pensions team provides legal advice from across its UK offices in London, Birmingham, Leeds and Manchester.

Our award-winning pensions team offers comprehensive trustee training on a wide range of matters, communicating complex issues in an understandable and engaging way. Our imaginative and interactive sessions stimulate audience participation and understanding, including formats such as case studies, role-plays and quizzes. Our deep industry insights span both legal and trustee perspectives.

Please visit our Pensions Thought Leadership Library to access our publications, including materials from recent UK Pensions campaigns such as Pensions Life Hacks, #AttentionPensions and #How2DoPensions.

Courses offered:

Revision and exam training sessions for the PMI Certificate in Pension Trusteeship (Unit 1: DB/DC) – arranged on demand for group bookings
Bespoke courses on any legal issues relating to occupational pension schemes
Hot topics sessions
Scheme conversance training

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WTW

At WTW, we provide data-driven, insight-led solutions in the areas of people, risk and capital. Our expertise supports pension trustees and sponsors in achieving governance and good member outcomes.

WTW's Trustee and Scheme Management Training helps trustees and pension scheme professionals stay confident in an increasingly complex pensions landscape. Delivered by experienced consultants, the courses go beyond The Pensions Regulator's online toolkit, offering practical insight, face-to-face discussion and shared learning in friendly, small-group settings. Suitable for new and experienced trustees, scheme managers, and HR or finance professionals, the training supports regulatory knowledge, legal responsibilities, funding and investment understanding. Flexible options include scheduled courses, online or in-person delivery, and bespoke programmes tailored to individual scheme needs. With legislation and best practice constantly evolving, WTW's training provides essential knowledge refreshers and ongoing professional development to support effective, well-governed pension schemes.

Courses offered:

Introductory DB Trustee training	Thursday, 15 October 2026, 09.00–16.00 (in person, London WTW)
Introductory DB Trustee training	Thursday, 22 April 2027, 09.30–16.00 (online)

Becoming a PMI Accredited Lay Trustee

Raising standards. Building confidence. Strengthening governance.

Lay trustees play a vital role in pension scheme governance, bringing insight, independence and lived experience to trustee boards. The **PMI's Lay Trustee Accreditation** provides a clear, respected pathway for lay trustees who want to demonstrate professional-level competence and commitment to excellence.

Accreditation is more than recognition – it is a powerful signal to schemes, members and regulators that you meet **the highest standards of trusteeship** and are equipped to meet today's complex governance challenges.

Why become an accredited Lay Trustee?

Lay Trustee Accreditation is a formal, industry-recognised status awarded by The Pensions Management Institute (PMI), the official qualifications provider for pension trustees. Built to professional trustee standards, the programme equips lay trustees with robust technical knowledge and essential soft skills, while providing professional recognition backed by the PMI seal of approval.

Accreditation confirms that an accredited lay trustee:

- Meets clear minimum standards of knowledge, understanding and competence
- Is committed to good governance and best-practice decision-making
- Continues to invest in ongoing professional development
- Has increased confidence when contributing to trustee board decisions
- Demonstrates credibility with sponsoring employers, advisers and regulators

For pension schemes, the presence of accredited lay trustees signals strong governance, accountability and preparedness for future challenges.

David Weeks, Co-Chair, Association of Member Nominated Trustees, comments:

"The Pensions Regulator's recent consultation exercise confirmed the widespread support for the MNT role that exists across the industry. AMNT now welcomes PMI's new accreditation scheme, which gives formal parity of esteem between lay and specialist trustees. We look forward to working with PMI to see how best to put the scheme into operation."

What does accreditation involve?

To achieve PMI Lay Trustee Accreditation, trustees must demonstrate both learning and real-world experience, including:

- Successful completion of The Pensions Regulator's Trustee Toolkit
- Completion of both units of the PMI Level 3 Certificate in Pension Trusteeship
  – Unit 1: Professional Trusteeship
  – Unit 2: Soft Skills
- Evidence of current trustee appointments
- Ongoing commitment to **Continuing Professional Development (CPD)** to maintain accredited status

This ensures accredited lay trustees operate with confidence, credibility and professional judgement.

Take the next step

If you are a lay trustee who wants to strengthen your impact, enhance your expertise and demonstrate excellence, PMI Lay Trustee Accreditation is the next step in your journey.

CLICK HERE TO LEARN MORE AND APPLY

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Becoming a PMI Accredited Professional Trustee

Raising standards. Demonstrating credibility. Strengthening confidence.

Professional trustees play a critical role in ensuring high standards of governance across pension schemes, providing specialist expertise, independence and professional judgement. PMI's Professional Trustee Accreditation offers a trusted, industry-recognised standard for professional trustees who want to demonstrate excellence, integrity and regulatory readiness.

Accreditation is more than recognition – it provides assurance to pension schemes, sponsoring employers, regulators and advisers that you meet rigorous professional standards and are equipped to manage today's complex and evolving governance environment.

Why become an Accredited Professional Trustee?

Professional Trustee Accreditation is a formal, industry-recognised status awarded by The Pensions Management Institute (PMI), the official qualifications provider for pension trustees. Built specifically for professional trustees, the programme sets a high bar for competence, conduct and accountability, providing a clear benchmark of quality across the industry.

Accreditation confirms that an accredited professional trustee:

- Meets defined professional standards of knowledge, understanding and competence
- Complies with "fit and proper" requirements, including regulatory and DBS checks
- Has credible and relevant professional experience within the pensions industry
- Is committed to high standards of governance and ethical decision-making
- Maintains robust ongoing continuing professional development (CPD)

For professional trustees, accreditation strengthens credibility, supports professional reputation and provides independent reassurance of the quality of services offered. For pension schemes and employers, appointing an accredited professional trustee demonstrates strong governance, accountability and confidence in decision-making.

What does accreditation involve?

To achieve PMI Professional Trustee Accreditation, applicants must demonstrate professional competence, experience and regulatory fitness, including:

- Successful completion of The Pensions Regulator's Trustee Toolkit
- Completion of both units of the PMI Level 3 Certificate in Pension Trusteeship:
  – Unit 1: Professional Trusteeship
  – Unit 2: Soft Skills
- Compliance with "fit and proper" requirements, including a basic DBS check
- Evidence of credible and relevant professional experience within the pensions industry
- Provision of appropriate professional references
- Ongoing commitment to annual Continuing Professional Development (CPD) to maintain accredited status

Accredited professional trustees must continue to meet PMI and regulatory requirements to retain their status, ensuring standards remain current, consistent and trusted.

Take the next step

If you are a professional trustee who wants to demonstrate excellence, strengthen market confidence and benchmark your services against recognised professional standards, PMI Professional Trustee Accreditation is the next step in your professional journey.

CLICK HERE TO LEARN MORE AND APPLY

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PMI Trustee Membership

Board Members

Trustee Group Board membership is open to groups of trustees joining from the same board and offers discounted rates from individual membership. Trustee Group Board members enjoy additional benefits including discounted membership rates and access to group training.

Individual

Pension scheme trustees play a vital role in ensuring good outcomes for members. Holding Trustee Group membership demonstrates a commitment to improving trustee knowledge and understanding (TKU) and offers a wide range of resources to help trustees meet scheme governance requirements and maintain high standards.

To apply for the PMI's Trustee Membership please contact us

Telephone:
+44 (0) 20 7392 7410

Email:
membership@pensions-pmi.org.uk

Trustee benefits

- Networking and Learning: Enjoy complimentary admission to **PMI events**. Plus member exclusive rates for upcoming **training sessions**.
- Fast track service and member discounted rates for **PMI's trustee accreditation programmes**.
- Free training pass for the online training series **Secretary to the Trustee (Basic).**
- Member initiatives such as the **Mentoring and Development Programme**: Now in its fifth year running. PMI Trustee members can sign up as either mentees or mentors.
- Knowledge Hub: Monthly magazines, technical supplements, case studies and referral resources.
- Join the PMI Trustees Special Interest Group (SIG): Engage in vibrant, trustees-only forums to seek advice, share insights, and connect with fellow trustees.

For more information, please visit our website:
www.pensions-pmi.org.uk

PMI Trusteeship Qualifications

Award in Pension Trusteeship (APT)
APT is a qualification for Trustees or those interested in Trusteeship, based on The Pensions Regulator's indicative syllabus. It provides formal recognition of a Trustee's knowledge and understanding (TKU) in line with the requirements of the Pensions Act 2004.

For a private sitting please contactJames Cumine at jcumine@pensions-pmi.org.uk

Certificate in Pension Trusteeship (CPT)
The CPT will give those wishing to become Accredited Trustees the necessary qualification to prove their knowledge and their application of this knowledge, in their role as an Accredited Trustee.

For a private sitting please contact James Cumine at jcumine@pensions-pmi.org.uk

Diploma in Pension Trusteeship (DPT)
The DPT is a new, standalone award, designed to show judgement when dealing with complex pensions issues, above and beyond technical knowledge.

The aim of this qualification is to increase professionalism further and highlight the distinction between Lay/Member nominated trustees and Professional trustees qualified at the same level.

To apply or find out more, contact us at pmiqualifications@pensions-pmi.org.uk

Telephone: +44 (0) 20 7392 743692 7410

Contact Us

If you would like to be featured in this directory please get in touch.

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