

Future-proof your pensions career with PMI Qualifications



**Pensions
Management
Institute**

Academy



**Pensions
Management
Institute**

Moving pensions forward

Moving pensions



Who is the PMI?

With more than 45 years of successful operation behind it, the PMI is an organisation at the cutting edge of pensions, supporting and developing the experts who run UK pension schemes.

It has the broadest skills base of pensions professionals and trustees in the UK, with some 7,000+ members dedicated to establishing, maintaining and advancing the highest levels of pensions knowledge.

PMI members are responsible for managing and advising some of the largest institutions in the world and taking key decisions on substantial financial matters. With some £1 trillion invested in UK pensions, PMI members have a vital role to play in shaping the nation's financial future.

forward



12,500+
Students since 2016



7,000+
Members

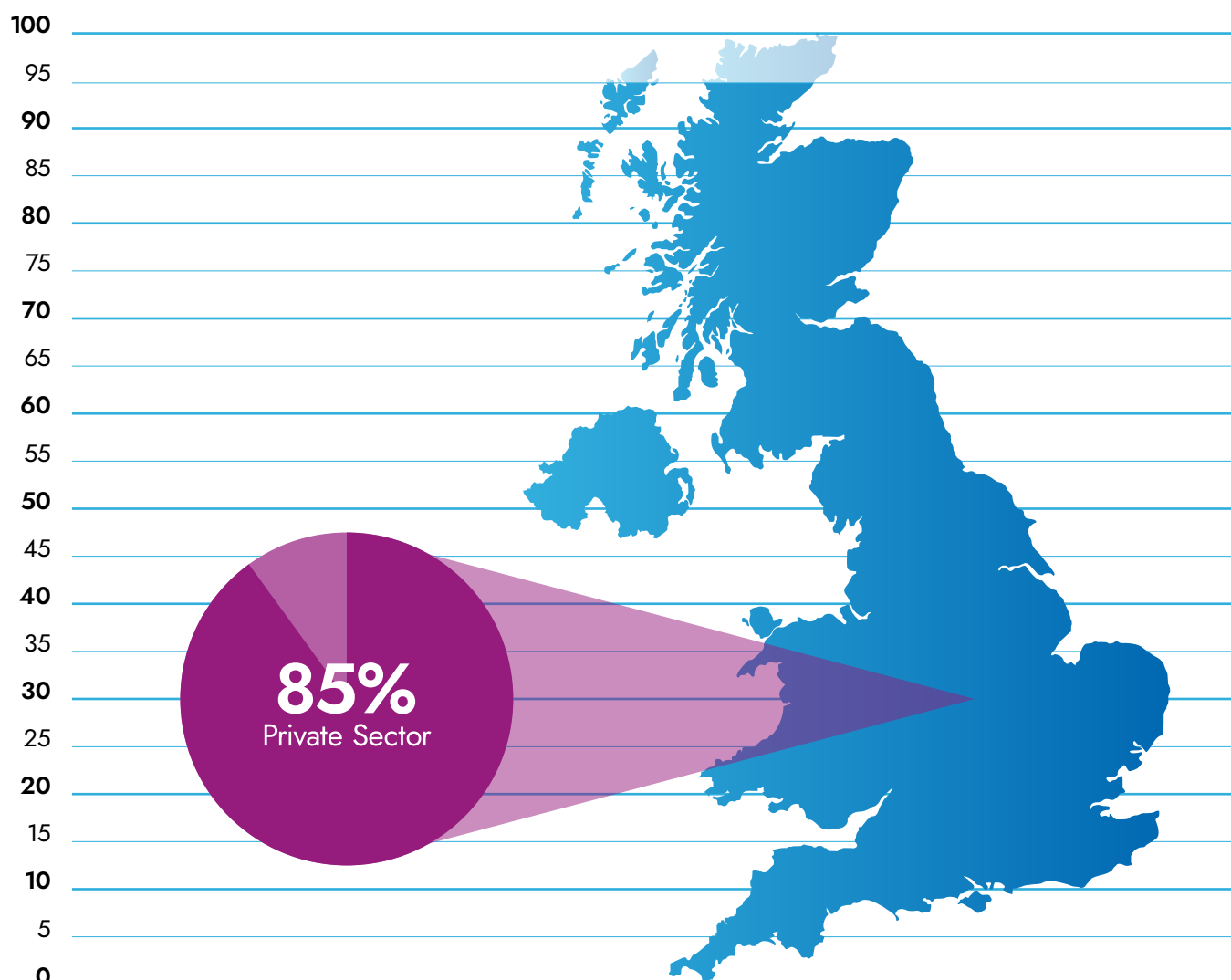


1,000+
Trustee Group members



A Breakdown of our Membership

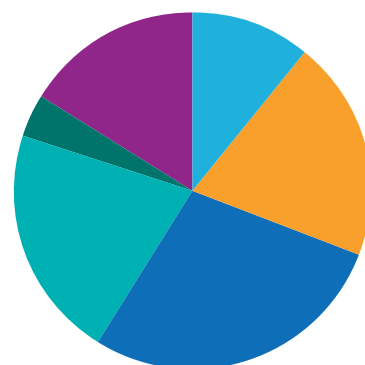
Of our **7000+** members, **95%** are based in the UK,
and **85%** work in the private sector.



Current members:

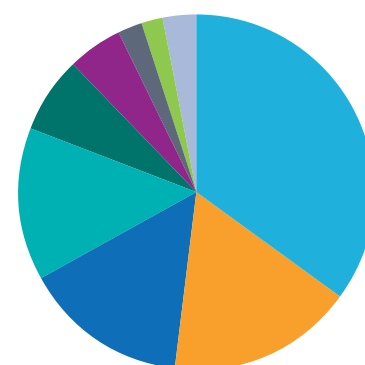
Which of the following best describes your current job level?

- Owner / Executive / Partner - 11%
- Senior Management - 20%
- Middle Management - 28%
- Intermediate - 21%
- Entry Level - 7%
- Other - 5%



Member employment profile:

- Pensions Managers (private sec) - 35%
- Trustee - 17%
- Administration - 15%
- Consultancy - 14%
- Pension Managers (public sec) - 7%
- Law - 5%
- Actuarial - 2%
- Accountanc - 2%
- Life Insurance - 3%



Why Join the PMI and Gain our Qualifications?

1



Experience unrivalled affordability

We work closely with the regulator to deliver better value for money compared to other professional bodies.

2



Receive cutting edge qualifications

Our qualifications are updated regularly in line with the current market needs.

3



Shape the nation's financial future

With some £1 trillion invested in UK pensions, PMI members have a vital role to play in shaping the nation's financial future.

4

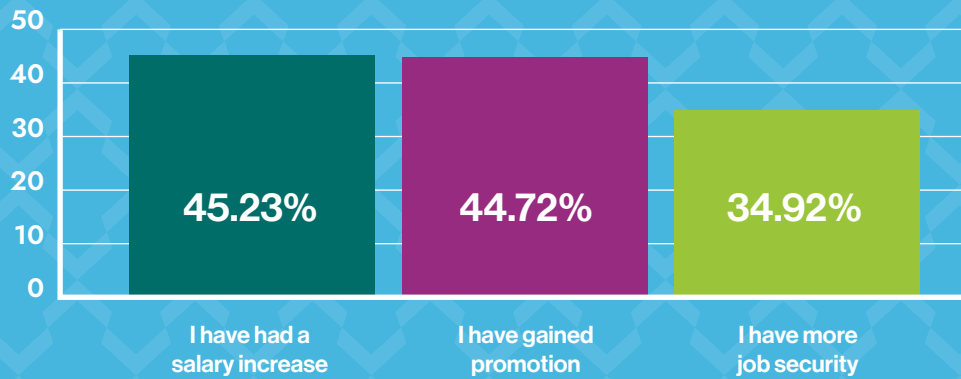


Access an array of resources

Becoming a PMI member will grant you access to a wealth of professional development tools and insights.



Earn a competitive salary and better career progression



5



Learn from industry experts

All our specialist teaching staff have real experience from the public and private sector.

6



Gain recognition

As a member, you are entitled to use the designatory initials. This is globally recognised and will help you further strengthen your professional standing within the industry.

7



Connect with likeminded professionals

As a student member, you get access to attend exclusive PMI events which allows you to network with over 6,500 of our members.

8




Move pensions forward

Play a key part in providing strategic insights needed to build and promote excellence within the industry.

9

Study Options and Competency Framework



Role	Level	PMI Qualifications	Membership Achieved once complete
Trustees	3	Award in Pensions Trusteeship	Trustee
	4	Certificate in Pensions Trusteeship	Trustee Member or Certificate (CertPMI)
	5	Diploma in Pensions Trusteeship	Trustee Member or Certificate DipPMI)
Apprenticeships	3	Workplace Pensions (Administrator or Consultant)	-
	6	Financial Services Professional	
	4	Actuarial Technician	
Strategic	5	Diploma in Employee Benefits & Retirement Savings International Employee Benefits Diploma Diploma in Regulated Retirement Advice	Diploma (DipPMI)
	6	Advanced Diploma in Retirement Provision	Associate (APMI)
Senior	5	Diploma in Retirement Provision	Diploma (DipPMI)
Manager	4	Certificate in Pensions Calculations, Retirement Provision Certificate	Certificate (CertPMI)
		Certificate in Pension Scheme Member Guidance	
Supervisor	3	Certificate in Pension Administration, Certificate in Pension Essentials Award in Pension Trusteeship, Certificate in Pension Trusteeship	Certificate (CertPMI)
Support	2	Award in Pension Essentials	VQ Student (For Study Duration)



The Perks of PMI Membership

The PMI's Membership will support you throughout your career, whether you are looking to enhance your skills, gain professional recognition, or simply grow your network of like-minded professionals.

Your membership will provide:

1



Designatory initials

Add the widely respected designatory letters (CertPMI, DipPMI, APMI, FPMI) after your name to further strengthen your professional standing.

2



Access to thought leading content

Free access to online resources including on-demand webinars, Pensions Aspects magazine, technical supplements, industry research and more.

3



Networking

Extend your professional reach by gaining access to our 7000+ members, including the largest Trustee network in the UK.

4



Shaping the sector

Gain access to PMI's working groups and committees such as Trustee Group, Policy Committee and more. Help PMI shape the future of pensions.

5



Events and training

Get access to regular CPD event absolutely free. Tune in to an array of events including webinars, roundtables, conferences and dinners - bringing you content from various industry experts and thought leaders.



Obtaining the PMI's Certificate of CPD will allow the Boards to demonstrate more formally to the scheme members the training and development undertaken during the previous year, which is particularly helpful at a time when greater emphasis is being placed on good scheme governance.

Testimonial

Grant Lore,
Group Pensions Director at Thomas Miller & Co. Limited

The PMI Apprenticeship Programme

Helping employers attract and grow new talent.

What are apprenticeships?

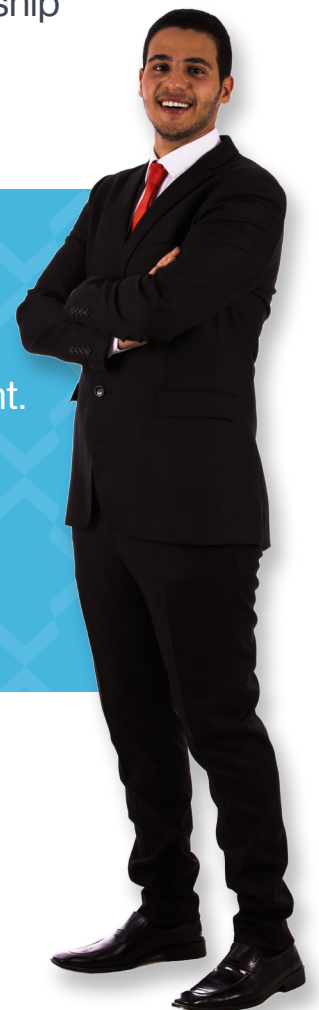
Simply put apprenticeships are a real job with structured training lasting at least 12 months.

An apprentice is employed like any other member of staff, and is supported and trained by both their employer and an approved apprenticeship training provider.

Why undertake an apprenticeship?

Apprenticeships are becoming an increasingly popular recruitment strategy – a way of attracting and growing new talent.

Employers are also using them as a catalyst to review and re-design their whole workforce development strategy – supported by the introduction of the apprenticeship levy, or by government funding.



Relevant Apprenticeships

The PMI has been central to some of the exciting new apprenticeship developments in Workplace Pensions.

We've worked in collaboration with a number of employers and other professional bodies, as part of 'trailblazer' groups to create two new apprenticeships:

Workplace Pensions Apprenticeship – level 3

An entry-level apprenticeship standard for workplace pensions consultants or administrators – the standard has a core and options format allowing you to select the specialist requirements for either Administrators or Consultants.

Financial Services Professional Apprenticeship - level 6

This is a core and options apprenticeship that covers a broad range of occupations within financial services, and workplace pensions is one of 6 specialist options.

The Pension option aligns to such roles as Pensions Consultants, Senior Administrators or Pensions Managers.

Funding an Apprenticeship

What PMI qualifications are included as part of these apprenticeships?

These apprenticeship standards include the following PMI qualifications (or parts thereof):

- Award in Pensions Essentials
- Retirement Provision Certificate
- Certificate in Pension Scheme Member Guidance
- Certificate in Pensions Essentials
- Certificate in Pensions Administration
- Certificate in Pension Calculations
- Diploma in Pensions Administration
- Advanced Diploma in Retirement Provision

Apprenticeship levy



For businesses with a pay bill of over £3m

Pay 0.5% of UK payroll to fund apprenticeships

Receive 10% Govt top up on your contribution

Non-levy payers



Govt will contribute 90% of the cost of an apprenticeship

Employers with under 50 staff will receive 100% of apprenticeship funding for applicants between 16 and 18 years of age

For a full breakdown of our apprenticeship program, including information about additional apprenticeships, visit:

<https://www.pensions-pmi.org.uk/pmi-academy/apprenticeships/>

Student Testimonials

1



I am optimistic that completing the Advanced Diploma in Retirement Provision will aid my career. I find the main benefit of completing the exams is that it broadens my knowledge in pensions and gives me confidence in my skill and understanding in my role.

Completing the Diploma gives me a rounded approach as you cover a wide range of topics which you may not come across in your day-to-day work.

Helen Jones Barnett Waddingham

2




Over the past 13 years in pension administration, I have achieved the Qualification in Pension Administration (QPA), Certificate in DC Governance and the Advanced Diploma in Retirement Provision.

I have then taken more of the theory-based exams helping to round out my pensions knowledge in areas that I may not be involved in on a day-to-day basis such as Trustee Governance, this helps to provide a broader understanding of the subjects I encounter from an administration perspective.

As a PMI member I get access to a group of likeminded people and the ability to improve and expand my industry knowledge and through attendance at events and seminars.

Daniel Heaton, Barnett Waddingham



89% of students
would recommend
PMI qualifications
to others

3



I have recently completed my Advanced Diploma in Retirement Provision Award, meaning I am now an Associate member of the PMI. The exam qualification has allowed me to broaden my technical knowledge around several pension topics, which in turn has helped me progress with my career at LCP and develop my understanding of the job.

The PMI syllabus breaks down the topics into various categories and allows learners to focus on specific areas within each unit. PMI offer support with study materials, along with the use of a tutor who can mark any assignments or mock exams that you complete prior to the exam. The feedback on these assignments can be very valuable tools when sitting the exams.

Learner has recently completed ADRP & works at Lane Clark & Peacock

4



I am currently part way through APE and CPC. Studying both qualifications has benefitted me as my knowledge has expanded and given me more confidence in my day to day work which in turn has helped me move up in my career. Now going into complex cases I have an immediate understanding of how to move forward with the case.

Taking the exams with PMI has been an easy and comfortable experience, despite the challenges of everyone working from home. The online test system is easy to navigate and straight forward to use which is vital under exam conditions.

Learner is part way through APE & CPC & works at Lane Clark & Peacock

Why do Employers Prefer the PMI?

PMI membership offers you and all your employees and colleagues member access to research, events, networking and representation at key groups.

You can use your membership to share your knowledge with PMI members and promote a stronger sense of community cooperation.

Membership covers all employees within your organisation, and provides you the following benefits:

Benefits

Assurance of quality

- Getting your employees professionally qualified in pensions assures you of a high performing workforce.
- It also assures your customers and clients that your organisation is committed to a high quality application of pensions management.

Motivated staff

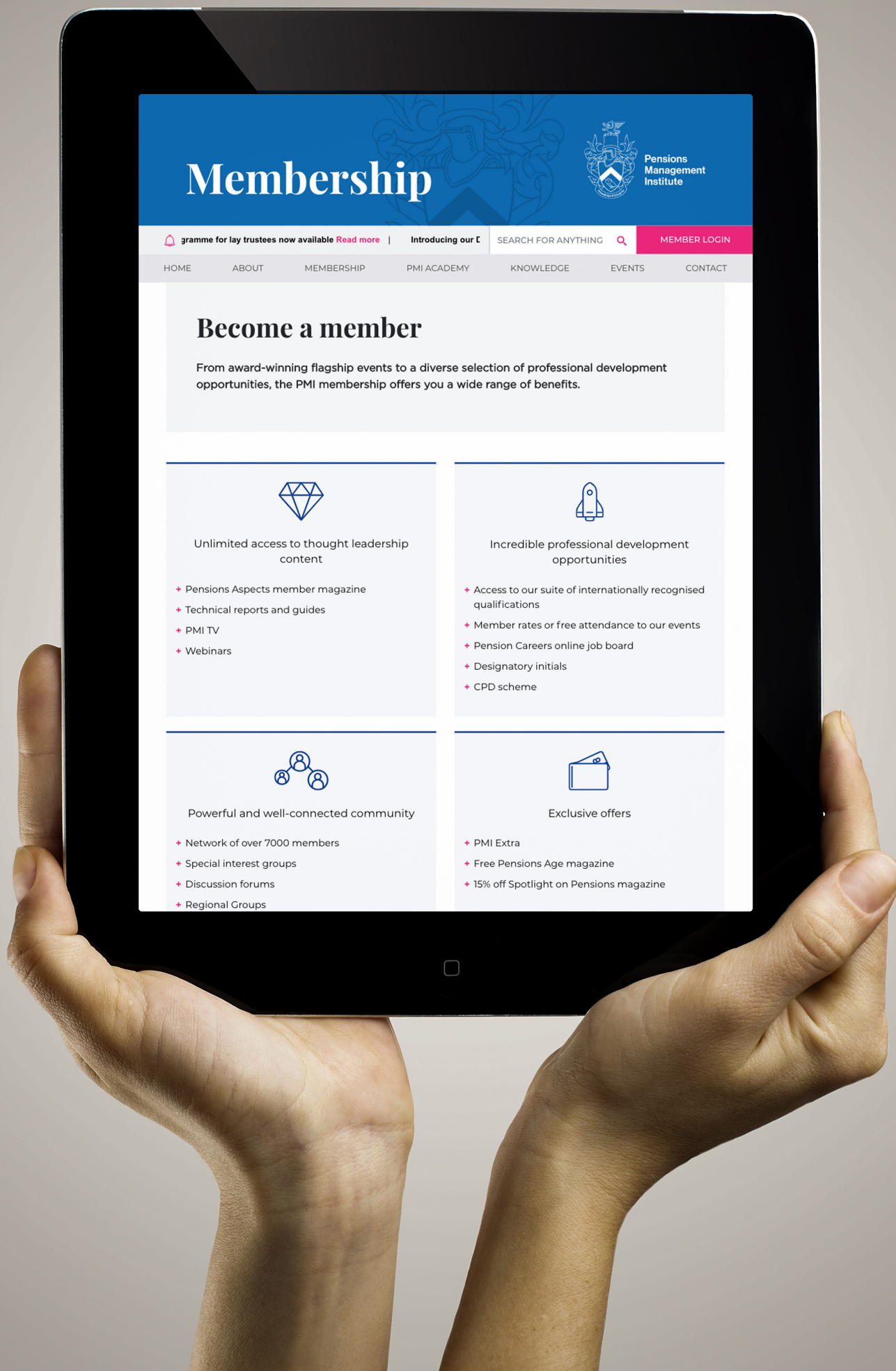
- By investing in their training and development, your staff feel valued and able to grow in their roles.
- Better staff retention
- Encouraging individuals to apply for professional development through qualifications recognises their value to your organisations and rewards them by offering better job satisfaction.

Continuous improvement

- Our members are committed to their continuing professional development (CPD). Supporting professional development among your employees fosters this commitment to keeping skills sharp and knowledge up to date.

Increased influence

- PMI offers numerous opportunities to network with professionals from other organisations. This allows our members to increase engagement and influence within the sector.



Membership



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gramme for lay trustees now available [Read more](#) | [Introducing our C](#) [MEMBER LOGIN](#)

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Become a member

From award-winning flagship events to a diverse selection of professional development opportunities, the PMI membership offers you a wide range of benefits.



Unlimited access to thought leadership content

- + Pensions Aspects member magazine
- + Technical reports and guides
- + PMI TV
- + Webinars



Incredible professional development opportunities

- + Access to our suite of internationally recognised qualifications
- + Member rates or free attendance to our events
- + Pension Careers online job board
- + Designatory initials
- + CPD scheme



Powerful and well-connected community

- + Network of over 7000 members
- + Special interest groups
- + Discussion forums
- + Regional Groups



Exclusive offers

- + PMI Extra
- + Free Pensions Age magazine
- + 15% off Spotlight on Pensions magazine

Contact Us

Get in touch with one of our team members to find the right membership for you.

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