Trustee Training Directory 2025

The Need for Trustee Training

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.

As the professional institute for the sector, the PMI is constantly developing services and resources to assist trustees in their training and education journey.

This must-have Trustee Training Directory has been compiled in association with some other reputable training providers in the sector to support trustees. The courses listed in this document are suitable for new trustees and those looking to refresh their knowledge including legal, regulatory, investment and scheme-specific knowledge.

We hope you find all the support you need for your training in this document. Please get in touch if you wish to see other topics or training sessions listed here.

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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.

Courses offered:

Course title	Date	Where	Summary	For who?	Price
PMI Management Soft Skills	September 2025 - February 2026 (6 sessions)	London	Helping managers to differentiate themselves and their company; developing skills to deliver excellent client service and work effectively with colleagues.	Managers, emerging leaders, senior executives needing skill refinement, technical professionals who want to improve their workplace effectiveness, entrepreneurs, remote workers, professionals seeking personal growth	**PMI members** £4,500 (+VAT) **Non-members** £5,500 (+VAT)
Secretary to the Trustee (Basic)	20 - 22 October 2025	Online	Our expert panel will talk you through the essentials of the role. Designed for those with little or no pension trustee knowledge.	Secretary to pension 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)	23 - 24 October 2025	Online	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.	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 2025	Edinburgh	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 trustee members:** Free **Non-members** £375 (+VAT) **places are limited

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Barnett Waddingham

Barnett Waddingham is a leading UK consultancy specialising in risk, pensions, investment, risk and insurance, trusted by clients across both the private and public sectors – including 22% of FTSE 100 and 15% of FTSE 350 companies.

Barnett Waddingham's PMI-accredited training course supports defined benefit (DB) pension scheme trustees in understanding key duties, aligned with The Pensions Regulator's 'Scope Guidance'. Held online over three consecutive mornings (9am–11.45am), the course offers a solid foundation in DB scheme governance, making it ideal for new trustees or those refreshing their knowledge.

Day 1: Trusteeship

Trustee duties, discretion, and regulation, plus a case study.

Day 2: Assets and assumptions

Asset classes, funding strategy, liability assumptions, and a case study.

Day 3: Strategy

Investment strategy, actuarial valuations, the Scheme Funding regime, and funding negotiations case study.

The course also supports completion of the Trustee Toolkit with confidence.

We also offer online defined contribution (DC) pensions training for all those involved in DC pension arrangements, whether you are an employer or a trustee.

Courses offered:

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

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Columbia Threadneedle Investments

Columbia Threadneedle Investments is a leading global asset management group that provides a broad range of actively managed investment strategies and solutions for individual, institutional and corporate clients around the world.

We understand it can be hard to stay on top of the investment aspects of pensions in addition to all your other day-to-day responsibilities. With this in mind, we have developed this training programme for pension trustees and targeting all levels of investment experience.

The programme

Training webinars:
CPD-accredited webinars providing you with an opportunity to watch and ask any questions live or view on demand in your own time.

Short training videos:
Access some of our most popular training topics in bite-sized modules.

Resources:
Read our latest thinking on key asset classes in the pensions world.

Courses offered:

Webinar	Macroeconomics & DB pensions
Webinar	Understanding the DC market
Training video	LDI: What is a bond?
Training video	LDI: Macroeconomic basics for pension schemes
Training video	LDI: An introduction to LDI
Training video	LDI: LDI in practice
Training video	LDI: Combining LDI with growth
Training video	LDI: Collateral management in LDI
Training video	LDI: Building the right LDI collateral support framework
Training video	LDI: What are the defined benefit endgame options
Training video	LDI: Endgame transition management made simple
Training video	Responsible Investment: ABC of TCFD – navigating climate reports
Training video	Responsible Investment: ESG integration within pension scheme portfolios
Training video	Responsible Investment: The nature and biodiversity toolkit
Training video	Fixed Income: An introduction to credit investing
Training video	Fixed income: Allocating to credit step by step
Training video	Fixed income: Social bonds and impact: Part 1
Training video	Fixed income: Social bonds and impact: Part 2
Training video	Real Estate: Investing in Real Estate
Training video	Real Estate: Sustainability in Real Estate: The basics
Training video	Real Estate: Sustainability in Real Estate: In practice
Training video	Multi-Asset: An introduction to Multi-Asset
Training video	Multi-Asset: Dynamic Multi-Asset
Training video	Multi-Asset: Sustainable Multi-Asset
Resources	LDI 2.0: Where to next for LDI?
Resources	Pensions Watch

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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.

To find courses please visit:
www.bookings.firstactuarial.co.uk

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 (online interactive session)
Defined Contribution training (in person)
Investment training for trustees (in person)
Investment training for trustees (online interactive session)
Key issues for year-end pension cost accounting disclosures

MAYER | BROWN

CLARITY FROM COMPLEXITY

In uncertain and challenging times you need advice and support that you can really rely on. At Mayer Brown our aim is simple – we want to help our trustee clients to have confidence in the decisions they make for their members.

How do we do this? We listen. We consider ourselves part of our clients' teams and behave accordingly. And we call on a depth of resources and expertise that's respected throughout the industry, based on decades of experience working at the heart of the UK pensions sector.

Fundamentally, we believe that common sense is key – clients choose us because we simplify the most complex pensions issues with a sensible yet strategic approach. That's probably why some of the largest pension schemes in the country work with us. And what could be more reassuring than that?

To learn more, visit **mayerbrown.com** and search for **Pensions**.

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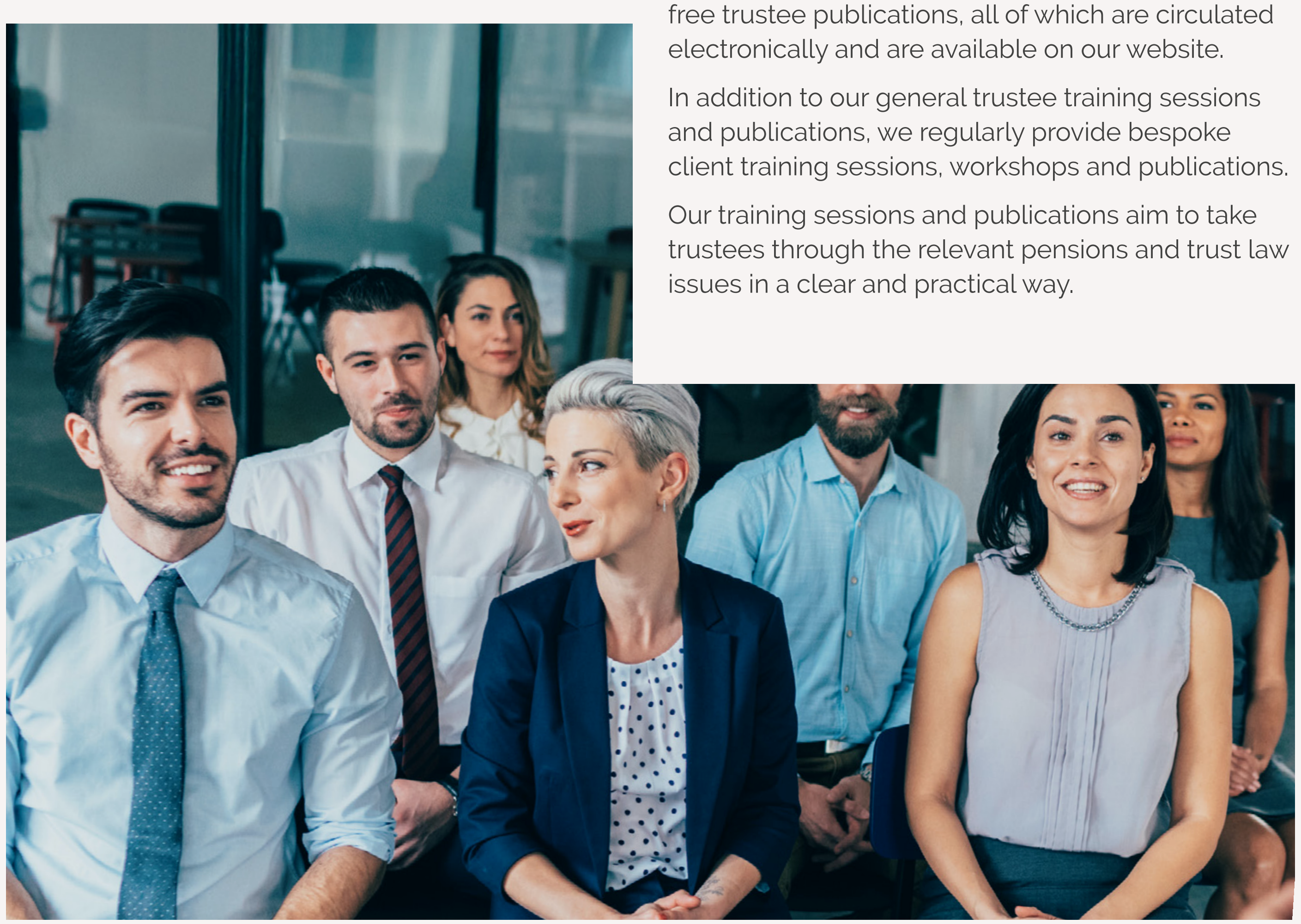
Mayer Brown International LLP

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.
Quarterly 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. Our entire focus is on advising the pensions and retirement savings 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.

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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
Bespoke courses

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 Trustee Group membership please contact us at: membership@pensions-pmi.org.uk

Join our Trustee Group today

Trustee Group membership is available on either an individual or board basis and offers support and benefits to help Trustee meet TKU requirements.

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.
- Member discounts: Through **HMCA** (Up to 40% of discounted rates for medical, dental, hospital and travel plans) and access to **Totum Pro** (Discounts and deals for eating out, fashion, technology, travel etc).
- 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

Additional Information

The PMI's 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

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Contact Us

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