APT Specification to Trustee Toolkit Mapping

Award in Pension Trusteeship (APT) – Curriculum Alignment Matrix

Purpose

This document maps the PMI Award in Pension Trusteeship (APT) specification learning outcomes to the most relevant modules within The Pensions Regulator Trustee Toolkit. The mapping is intended to support learners, tutors and curriculum planning. The Trustee Toolkit provides strong coverage of many APT knowledge areas, although some APT assessment criteria require additional study beyond the Toolkit.

APT Learning Area	Key APT Topics	Trustee Toolkit Module(s)
1. Law Relating to Trusts	Trust concepts, trustee appointment/removal, fiduciary duties, conflicts, advisers, governance, trustee powers	The Trustee's Role; Running a Scheme; Introducing Pension Schemes
2. Pensions Law & Regulation	Pensions legislation, TPR, tax, disputes, internal controls, MNTs, DB/DC design	Pensions Law; Running a Scheme; Introducing Pension Schemes
3. Investment & Funding Issues	Capital markets, asset classes, funding, covenant, managers, SIP, DB/DC investments, PPF	An Introduction to Investment; Investment in a DB Scheme; Investment in a DC Scheme; How a DB Scheme Works; Funding Your DB Scheme
4. Trust Deed & Rules	Scheme benefits, member classes, trustee discretions, employer/trustee relationship	Introducing Pension Schemes; The Trustee's Role; How a DB Scheme Works; How a DC

		Scheme Works
5. Statement of Investment Principles	SIP responsibilities, contents, objectives, asset allocation, monitoring	An Introduction to Investment; Investment in a DB Scheme; Investment in a DC Scheme

Core Trustee Toolkit Modules

Introducing Pension Schemes, The Trustee's Role, Running a Scheme, Pensions Law and An Introduction to Investment collectively cover the majority of APT learning outcomes 1, 2, 4 and 5.

Defined Benefit Content

How a DB Scheme Works, Funding Your DB Scheme, DB Recovery Plans, Contributions and Funding Principles, and Investment in a DB Scheme support APT outcome 3, particularly funding, covenant and actuarial concepts.

Defined Contribution Content

How a DC Scheme Works and Investment in a DC Scheme support APT coverage of DC governance, contributions, member outcomes, decumulation and charges.

Coverage Gaps

The APT specification includes a broader examination focus on trust law, detailed trustee powers, liabilities, use of advisers during employer distress/wind-up, specialised investment techniques, actuarial valuation concepts and examination-specific knowledge. Additional PMI reading should therefore supplement Trustee Toolkit study.