Pensions Management Institute

Training

Trustee Training Directory 2023

Introduction

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.

Contact us: sales@pensions-pmi.org.uk

Pensions Management Institute
Training

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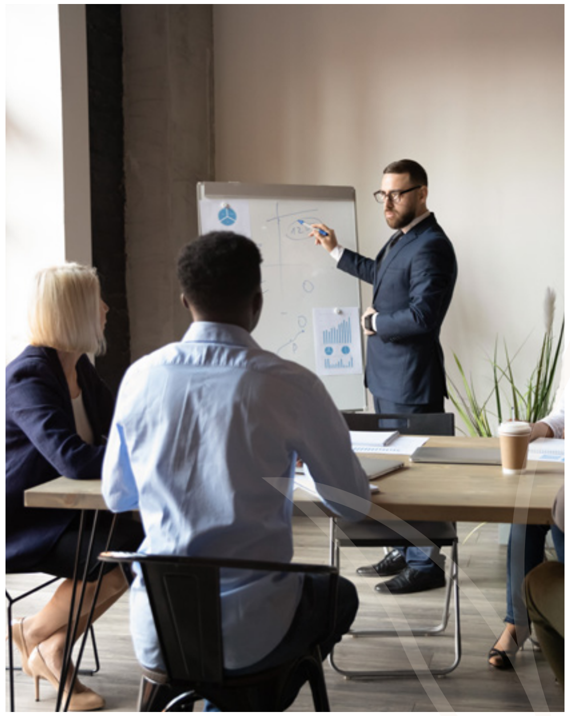
Pensions Management Institute (PMI)

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.

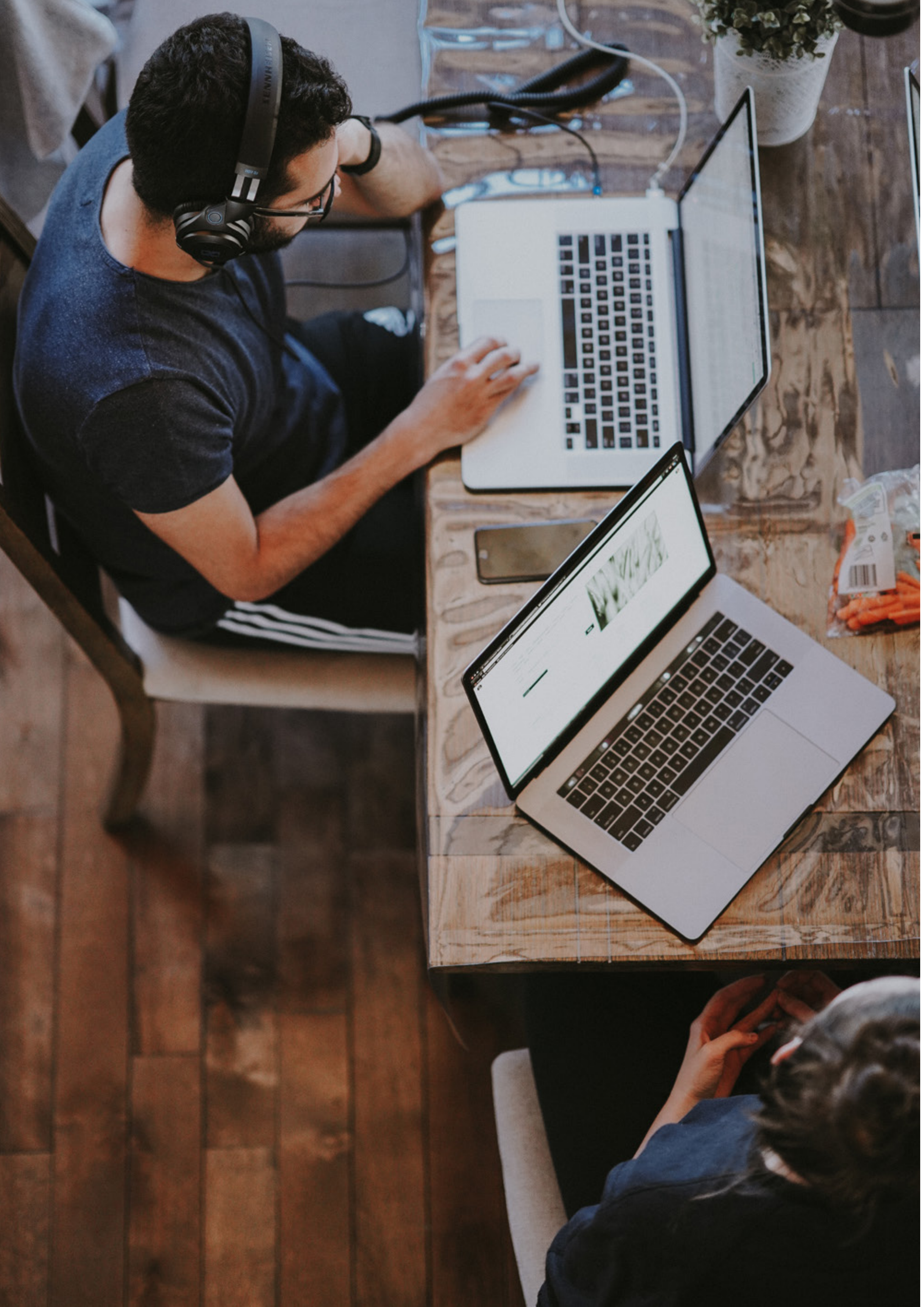
Course(s) offered:
PMI Training Sessions are an intensive period of study in a current topical area. They're relatively quick to complete, normally in a morning or afternoon and are directly related to specific and contemporary issues in the Pensions Sector.

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.

- **Introduction to Pensions (Basic)**
  Introduction to Pensions (Basic) is an online series designed specifically for those with little or no previous pensions knowledge. Our expert panel will talk through the essentials of the pensions industry.
- **Introduction to Pensions (Advance)**
  This Introduction to Pensions (Advanced) workshop is suitable for those who have some understanding of pensions but need to improve their knowledge of pension in the wider savings and employee benefits context to a more advanced level than our Introduction to Pensions (Basic) workshop.
- **Secretary to the Trustee (Basic)**
  Secretary to the Trustee (Basic) is 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.
- **Secretary to the Trustee (Advanced)**
  Secretary to the Trustee (Advanced) is 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.



- **Pensions Practitioner Training**
  The Pensions Practitioner course consists of a series of training sessions which address the key pensions issues of the day. The course will be essential for any pensions professional seeking a detailed examination of topical issues and will ensure that those who attend are perfectly prepared for the more demanding aspects of their current work.
- **Pensions Certificate in ED&I**
  Receive a Pensions Certificate in ED&I through Nelu Solutions ("Nelu") in partnership with the Pensions Management Institute. Apply immediately actionable steps to further board equality, diversity, and inclusion ("ED&I") and ESG strategic objectives.



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Barnett Waddingham

Proud to be a leading independent UK consultancy at the forefront of risk, pensions, investment and insurance. We're a team of over 1,500 people across 9 offices.

Course(s) offered:

Trustee training

Our comprehensive training programme effectively guides trustees through the fundamental issues highlighted in The Pensions Regulator's 'Scope Guidance'.

This programme is Pensions Management Institute (PMI) accredited and targeted specifically for trustees of defined benefit (DB) pension schemes.

This course provides both new trustees and those seeking a reminder with a thorough grounding in pensions matters - and the knowledge to complete The Pensions Regulator's Trustee Toolkit with confidence.

Topics covered include:

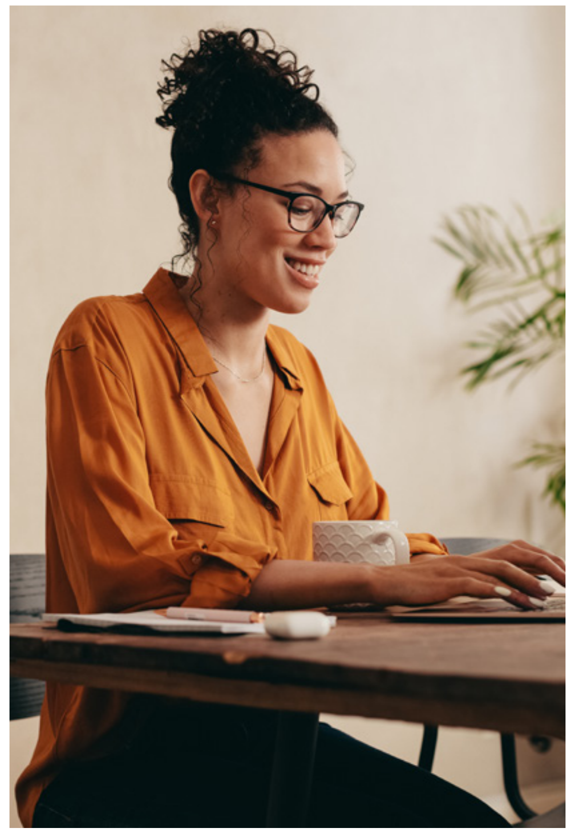
- The 'trustee knowledge and understanding' requirements
- The UK current pensions landscape and key regulatory changes
- An introduction to asset classes, funding strategy and investment principles
- The scheme funding regime, including The Pensions Regulator's DB funding code of practice

Timings:

Three online modules held over three mornings.

Frequency:

Regularly throughout the year - see website for details. DC Training is also available.



EVERSHEDS SUTHERLAND

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Website:
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Search under subject area "Pensions"

Eversheds Sutherland

Eversheds Sutherland is an international law firm, with a market-leading team of UK pension lawyers.

Course(s) offered:

Our online PMI Award in Pension Trusteeship (CPT unit 1) training programme is designed to draw on our long experience of successfully helping trustees to prepare for the exam through face-to-face training sessions. It uses pre-recorded modules to cover the core elements of the syllabus. This unique programme also includes two live, interactive sessions to encourage Q&A discussion. This programme is available to individual or groups of trustees. It is aimed at experienced trustees and is not suited to those who are new to pensions.

In addition, we provide regular legal update briefings and can organise bespoke or in-house training at a time and location to suit your needs.

- PMI Award in Pension Trusteeship (CPT unit 1) training programme
- Regular legal update and other briefings
- Bespoke training (on request)

GOWLING WLG

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Website:
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Gowling WLG

Gowling WLG is an international, full-service law firm with a leading UK pension practice comprising over 50 pensions specialists.

Courses offered:

We offer a range of training programmes which can be adapted to meet your particular requirements. Courses are led by senior pensions lawyers with wide-ranging, practical experience, and are fully interactive to promote exchange of ideas. We can tailor the content to suit defined benefit, defined contribution or hybrid schemes.

Basic trusteeship

A half-day course designed to cover the Regulator's Trustee Knowledge and Understanding (TKU) Scope Guidance and to align with the legal modules for the Regulator's Trustee Toolkit. This course will equip delegates to complete the Toolkit and satisfy the TKU requirements.

Also suitable for non-trustees who want to understand how pension trustees operate, e.g. pensions managers or individuals responsible for pension benefits and funding on behalf of an employer.

Advanced trusteeship

A one-day course for those seeking to achieve the PMI Level 3 Award in Pension Trusteeship or any equivalent accreditation, including professional trustees. Also useful for any trustees looking to deepen their understanding of their role.

Continuing professional development

We offer training on emerging legal issues to enable trustees to keep up-to-date. We can help you to develop an annual training programme and assist with access to training from other providers with different specialist backgrounds.

Bespoke Training Sessions

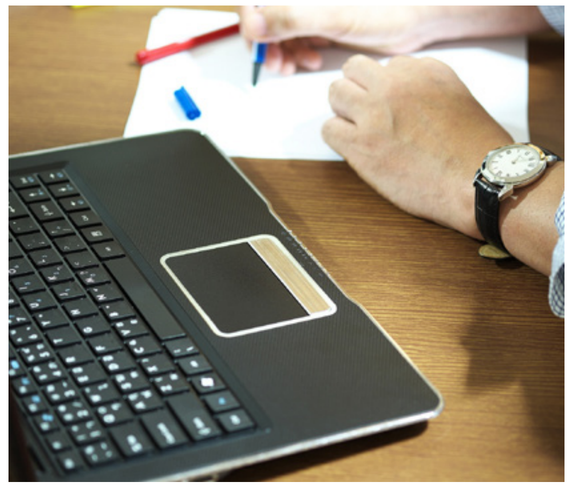
Many clients want to devise training for their trustees that reflects the specific features of their scheme and context. We have considerable experience in developing one-off sessions or programmes to suit your needs, in particular linking in to the specific powers and legal provisions of your scheme rules.

Location:

Offices in London or Birmingham, at your own premises, or online.

Frequency:

On request.



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Insight Investment

Insight Investment is a global investment manager committed to a single goal: partnering with our clients to help them achieve their objectives with the greatest certainty. To serve this goal, our investment platform focuses on risk-management solutions, including liability-driven investing (LDI), cashflow-driven investing (CDI) and longevity hedging; a full spectrum fixed income capability; and a range of multi-asset and absolute return strategies.

Course(s) offered:
Insight's training programme is designed to help delegates develop investment knowledge and understanding in the context of addressing their own pension schemes' funding challenges.

Topics range from explaining the basic investment toolkit to discussions on new developments which impact pension scheme outcomes.

Example topics:
- Strategies to help maximise the certainty of achieving your endgame objectives
- Understanding liabilities and how to manage liability interest rate, inflation and longevity risk
- Generating return to close funding gaps
- Responsible investment in liability-driven investment and fixed income
- Proposed revisions to the DB funding code and their investment implications

Frequency:
Live training sessions throughout the year

Location:
London

Online training
The Insight Training Hub hosts over 1,000 minutes of training videos accredited by CPD UK and the Pensions Management Institute.

Benefits:
- Keep track of your completed CPD training through the new training history function
- Access to investment training modules spanning three years, covering more than 45 modules
- Identify relevant content more easily by filtering through an array of topics: credit, LDI, macro, multi-asset and responsible investment

Bespoke training sessions:
Available upon request.

See our website for details of our live events and access to our training hub.

FOR PROFESSIONAL CLIENTS ONLY.

Training to help achieve your goals

Insight's training programme is designed to help you understand the key challenges facing pension schemes and empower you to make informed decisions.

Modules range from market basics through to advanced strategies, such as:

- Understand your liabilities and the different ways to hedge risk
- How to incorporate responsible investment across your scheme
- The implications of longevity risk and how to hedge it

You can sign up to attend our training events which are held throughout the year, or access over 1,000 CPD minutes online.

Our training programme is accredited by the Pensions Management Institute and CPD UK.

Find out more

https://www.insightinvestment.com/uk/institutional-investors/tools-and-resources/training/

https://www.insightinvestment.com/uk/institutional-investors/on-line-training-hub/uk-online-training-learning-hub/

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Pensions Management Institute
Accredited

CPD CERTIFIED
The CPD Certification Service

OPDU

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The Occupational Pensions Defence Union (OPDU)

We offer training and roundtable presentations for trustees, advisers, consultants or Boards for groups of at least 6 people, and can speak at larger events such as seminars and conferences.

Course(s) offered:
Our training comprises of a technical training seminar and we cover:

- The exoneration and indemnity clauses and how these work and their limitations;
- How insurance works as part of an integrated risk management strategy;
- Technical details of insurance including scope and breadth of cover offered and how each element works;
- Tips regarding what to watch out for in a good policy;
- Recent developments such as GMP equalisation;
- Anonymised claims examples.

The seminar is led by Martin Kellaway who is OPDU's Executive Director and an independent trustee chair of a DB scheme and accredited independent trustee by the Pensions Management Institute.

Seminar can be carried out either in person or via the internet.

Sackers

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Sackers

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.

Course(s) offered:
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.

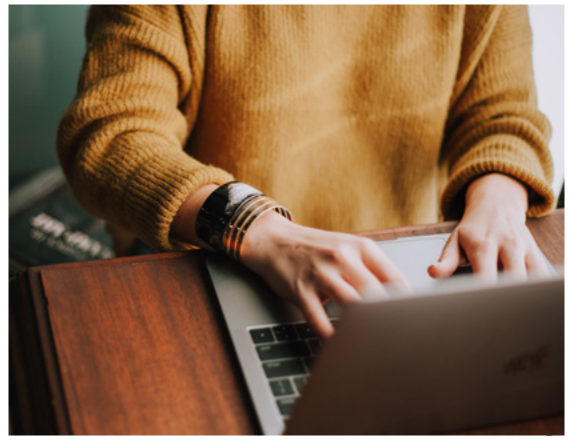
Quarterly Legal Updates
Our online Quarterly Legal Updates provide an essential overview of significant legal and regulatory developments affecting occupational pension provision in the UK.

Pensions for new trustees
These popular in-person sessions focus on the key legal issues for new trustees of DB, DC and hybrid schemes. We hold these twice per 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 the impact of rising inflation on DB and DC schemes, TPR's General Code, proposed changes for corporate trustees, and climate reporting.

"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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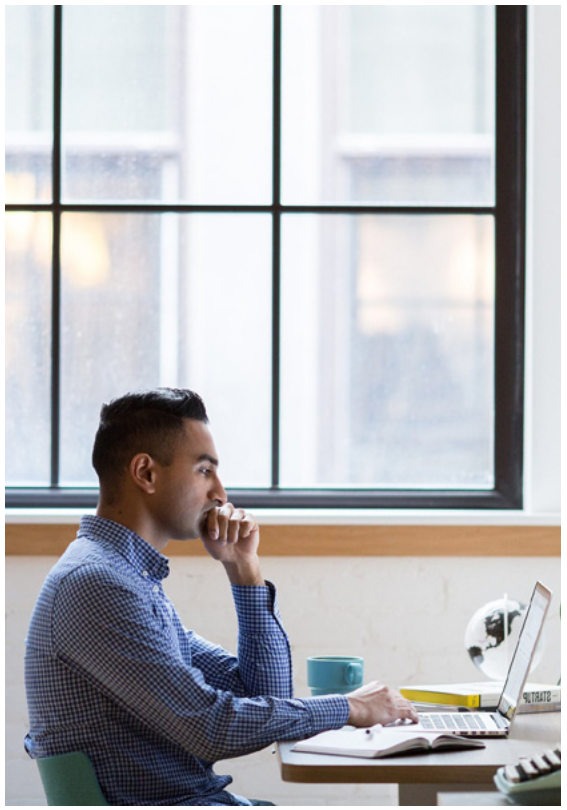
Squire Patton Boggs

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.

Course(s) offered:
Our 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 #AttentionPensions, #How2DoPensions and #PensionsTensions.

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



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T. Rowe Price

At T. Rowe Price we're solely focused on providing investment management and long-term results for you and your members.

Founded in 1937, we're an independent investment management firm managing over GBP 1.05 trillion in assets*. We service clients in 56 countries across Europe, the Americas, Asia and the Middle East and opened our UK office in 1979. We offer investors a full range of equity and fixed income strategies across multiple asset classes, sectors, styles, and regions. Our experience through all types of market conditions contributes to a proven investment strategy designed to produce strong performance for the long term.

* As at 31 December 2022

Course(s) offered:

Fixed Income: Back to Basics

Over the past five decades, T. Rowe Price has been widely recognised for our fixed income capabilities and have navigated multiple market crises and followed new asset classes as they grew from infancy. Fundamental research sits at the heart of everything we do and we truly believe we have the skills to equip you with an information edge.

The main focus of our training is to provide you with a better understanding of fixed income instruments and markets. Fixed income remains the world's biggest and most complex market and our aim is to help you navigate this asset class with confidence and clarity.

During our first session in May we went back to basics – explaining how fixed income securities work and how they can fit into your portfolio.

For questions or queries on further training from T. Rowe Price, please do not hesitate to get in touch.

PMI Trustee Qualifications and Accreditation

Certificate in Pension Trusteeship (CPT)

The CPT qualification will give those people 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.

Find out more here: www.pensions-pmi.org.uk/pmi-academy/qualifications/certificate-in-pension-trusteeship

Award in Pension Trusteeship (APT) – also known as CPT unit 2

The Award in Pension Trusteeship 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.

Find out more here: www.pensions-pmi.org.uk/pmi-academy/qualifications/award-in-pension-trusteeship

Trustee Accreditation

Building credibility and raising governance standards across the pensions industry.

Developed by the Pensions Management Institute, the Aptitude programme was formed following standards published by the Professional Trustee Standards Working Group (PTSWG) in 2019 to raise standards and provide assurance about the quality of professional trustees and discourage poor practices in the industry.

Professional trustees play an important role in pensions and should have a greater level of expertise and knowledge to meet a higher standard of care in comparison to other trustees.

For more information and how to register, please visit www.pmitap.org

PMITAP
ACCREDITED TRUSTEE
BY PENSIONS MANAGEMENT INSTITUTE

For any further queries please contact us here:
sales@pensions-pmi.org.uk

Pensions Management Institute
Trustee Group

Trustee Group

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 here: membership@pensions-pmi.org.uk

Trustee Group benefits

- Free attendance at PMI events, conferences, and seminars
- Trustee exclusive events (Roundtables and seminars)
- Free access to PMI webinars
- Opportunity to join regional groups
- Pension Careers – Online job board
- Interview and CV support from a recruiter
- Introduction or referrals for pensions related topics
- Pensions Aspects (PMI BI-monthly magazine)
- Pensions Age (monthly magazine)
- PMI Technical News (technical supplement)
- Opportunity to sign up on the PMI Mentoring and Development programme
- Can be co-opted onto PMI committee and councils
- HMCA discounts (Up to 40% of discounted rates for medical, dental, hospital cash and travel plans as well as income protection and vehicle breakdown products.)
- TOTUM PRO (Discounts and deals to hundreds of essentials – eating out, fashion, technology, travel etc)
- Favourable consideration for OPDU indemnity insurance
- CPD Online recording tool

Additional Information

PMI APT private sitting

If you would like to hold a private sitting, please contact James Cumine at **jcumine@pensions-pmi.org.uk** to enquire about availability. Private sittings can hold no less than 10 individuals and at least 4 weeks' notice must be given so that we can try and hold the exam on your chosen date.

Telephone:
+44 (0) 20 7392 7400

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.

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Contact Us

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Pensions
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