



Pensions
Management
Institute

ACHIEVING PENSIONS EXCELLENCE

PMI Trustee Group

Helping Trustees Succeed



The PMI Trustee Group

The PMI Trustee Group is designed to support individual trustees and trustee boards in maintaining the increasingly high standards required of them.

Members are granted access to a range of benefits to help them improve their Trustee knowledge and understanding (TKU) and meet scheme governance requirements.

Member Benefits

PMI Trustee Group members receive a range of benefits including:

- Free attendance at our trustee events
- Member rates for our other technical seminars and conferences
- Pensions Aspects - our regular member magazine
- Pensions Technical News - our quarterly newsletter
- PMI CPD accredited content, including PMI TV and webinars
- Access to content from our Insight Partners
- Access to our Regional Groups' events and meetings
- Networking and support opportunities with other trustees
- Access to the PMI Trustee Group diagnostic skills-gap survey – identifying areas where you may need additional training
- PMI Extra - offering discounted products and services



Benefits for Trustee Boards

There are additional benefits for groups of trustees joining from the same board.

Benefits for groups

- Access to group training
- Competitive membership rates

Benefits for entire boards

- Discounted membership rates
- The opportunity to participate in the PMI Trustee Group CPD scheme and receive an annual PMI Trustee Group CPD Certificate
- Favourable consideration by the Occupational Pensions Defence Union (OPDU) when assessing rates for trustee indemnity insurance

PMI Trustee Group CPD scheme

The voluntary CPD scheme is designed to support both individual trustees and trustee boards in demonstrating best practice with regard to TKU obligations.

For trustee boards, all board members will agree an annual CPD programme with their 'responsible person' and are required to complete that programme by 31 December each year.

We encourage boards to publicise their CPD certificate to pension scheme members. This shows that the trustee board is doing everything within its powers to provide good governance and operational management. It can also be used as evidence within the DC Chairs Statement.

Improving Your Depth of Learning

The Award in Pension Trusteeship

We recognise that trustees may not have a strong understanding in all areas required of them by TKU. Our Award in Pension Trusteeship (APT) provides formal recognition of TKU, in line with the requirements of the Pensions Act 2004 and covers law and pensions, core investment issues and funding and scheme management.

APT is an RQF Level 3 qualification, based on the Pensions Regulator's indicative syllabus. It has a recommended study duration of 60 hours and is assessed by a 90 minute multiple choice examination.

Any person undertaking the APT examinations receives free Trustee Group membership until the end of the calendar year in which they apply.

How to Join

PMI Trustee Group Membership runs from 1 January to 31 December – there are no pro rata rates but you can join at any time.

To apply visit our website or contact us:

membership@pensions-pmi.org.uk • 020 7392 7410

To find out more about the Award in Pension Trusteeship contact:

qualifications@pensions-pmi.org.uk • 020 7392 7400

www.pensions-pmi.org.uk