PMI Award in Pension Trusteeship (APT)/Unit 1 Recommended Reading List

Core Reading

- The Pensions Regulator – Trustees
- The Pensions Regulator – Trustee Toolkit
- *The Pension Trustee's Handbook – Robin Ellison (2024)
- HMRC Pensions Tax Manual
- MoneyHelper – Pensions & Retirement
- Pensions UK (formerly PLSA) – Made Simple Guides
- Institute and Faculty of Actuaries Publications

Further Reading

- Perspective – Pendragon Information Service - Pensions legislation, regulation and commentary
- The Pensions Ombudsman – determinations and guidance
- Financial Reports of Pension Schemes: Statement of Recommended Practice (SORP)
- Institute and Faculty of Actuaries publications and research

Key Subject Areas Covered

- Trustee duties and responsibilities
- Scheme governance and administration
- Trust law and pensions legislation
- Funding and investment
- Member benefits and communications
- Pensions taxation
- Risk management and internal controls
- ESG and stewardship
- Cyber security
- Pensions dashboards
- Dispute resolution and complaints handling
- Professional trustee standards and TKU requirements

*The Pension Trustee's handbook is ideal for learners sitting the Award in Pension Trusteeship exam.

Robin Ellison is one of the leading experts on Trustee law and trustee requirements. Robin has written a number of books, including the predecessor of the Handbook. Robin has now produced a new and updated version called **The Trustee Handbook** and has offered the PMI the opportunity to partner with him and offer his book to our members.

The PENSION TRUSTEE'S Handbook:

Unlock the complexities of pension fund management with the Pension Trustee's Handbook, the ultimate guide for trustees and pension professionals. Written by Robin Ellison, a renowned expert in pensions law, this book is essential for both new and experienced trustees who want to excel in their role.

Key resource: A must-have for anyone pursuing the Award in Pension Trusteeship exam, the PMI Trustee Pathway qualification or involved in pension scheme management.

Who Should Read This Book?

- New trustees: Get a solid foundation in pension fund management and trusteeship.
- Experienced trustees: Deepen your knowledge with advanced topics in investment governance, legal compliance, and member engagement.
- Pension professionals: An invaluable resource for those working in pension fund administration, law, or consultancy.

You can purchase the Pensions Trustee handbook via The Great British Bookshop here.