



How To Be A Top Trustee

Your Trustee Training Log

Every Trustee should be able to demonstrate that they are meeting the Regulator's Trustee Knowledge and Understanding (TKU) requirements covering:

- The law relating to trusts and to pension schemes generally,
- The principles relating to the funding of occupational pension schemes and the investment of the scheme's assets,

- The documents that are particular to their own scheme, so that they are able to make use of those documents in carrying out their functions.

This log can be used as an ongoing record of the training you have undertaken.

You should also carry out a training needs analysis on an annual basis to help you assess your training requirements and ensure you are up to speed with your responsibilities – see our TKU gap indicator for further details.

Name:	
Pension Scheme:	
Appointed (Date):	

Structured training

Subject	Date	Duration	Delivered by	Brief Description of Subject Matter
Example subject	Oct 2009	7 hrs	Aon Hewitt	Trustee training – a beginner's guide
TOTAL STRUCTURED Annual structured hours target				

Unstructured training (e.g. newspaper / web articles and magazines):

Subject	Date	Duration	Delivered by	Brief Description of Subject Matter
Example subject	Aug 2012	7 hrs	Aon Hewitt	Scheme governance, investment manager reviews
TOTAL UNSTRUCTURED Annual structured hours target				