



Pensions Training 2019/20

Empower results with knowledge and understanding

Defined Benefit Part 1 ▼	Defined Benefit Part 2 ▼	Defined Contribution ▼	Award in Pension Trusteeship ▼	Pension Governance Committee ▼	Course dates ▼	Pensions conference ▼	Contact us ▼
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Welcome

As a trustee of a pension scheme, the Pensions Regulator requires you to ensure you have the skills, knowledge and understanding you need to perform your role effectively early in your trusteeship.

New trustees are given six months to build up the relevant knowledge and skills, but with a lot to take in, and often only a couple of meetings to do so, it can be a daunting prospect.

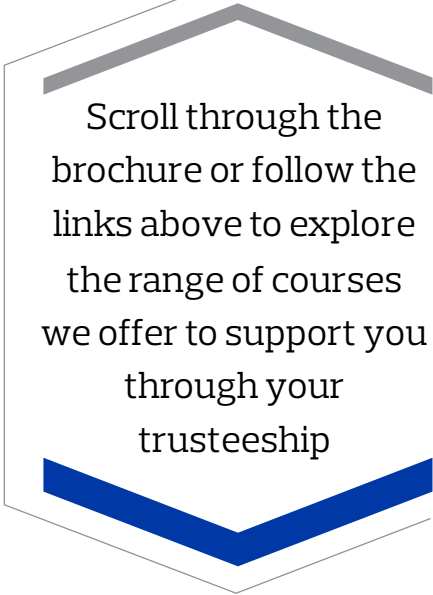
Pensions are also an ever evolving area, so once you’ve mastered the basics there is always something else to learn.

This brochure provides information on the courses we provide, as well as other resources to help you with the relevant knowledge and understanding.

NEW FOR 2019 - Defined Benefit Trustee Essentials

We are aware that some trustees of defined benefit (DB) schemes like to attend our Defined Benefit Part 1 and Part 2 courses in quick succession in order to fulfil their Trustee Knowledge and Understanding requirements.

That’s why we’re running a “Defined Benefit Trustee Essentials” course this year, which combines Defined Benefit Parts 1 and 2 into one course over two successive days.



Defined Benefit Part 1

This introductory course is suitable for new trustees and as a refresher for those with more experience. It will help you gain a clear understanding of your responsibilities as a trustee.

It covers:

- The current legal framework
- Benefits and scheme design
- Trust deed and rules and scheme documentation
- The parties involved
- Conflicts of interest
- Trusteeship in practice
- A brief introduction to funding defined benefit schemes
- The main asset classes
- A brief introduction to investment strategy for both defined benefit schemes and additional voluntary contributions
- Trustees' liability and protections

One day

Price: £550 + VAT per person

NEW FOR 2019 - Defined Benefit Trustee Essentials

This residential course combines Defined Benefit Parts 1 and 2 into one course.

The all-inclusive fee covers:

- Attendance at the two day seminar
- Course materials
- Overnight accommodation following the first day
- Meals and refreshments during the seminar

Two days

£1,250 + VAT per person (1 delegate)
£1,200 + VAT per person (2 delegates)
£1,150 + VAT per person (3+ delegates)



Defined Benefit Part 2

This course is suitable for more experienced trustees who have either already attended the Defined Benefit – Part 1 course or have some experience as a trustee of a defined benefit scheme.

It assumes an understanding of the basic concepts of trust law and trusteeship and some knowledge of asset classes and investment markets.

It provides a practical look at the key issues and decisions that defined benefit scheme trustees now face, including:

- The role of the Pensions Regulator and the requirements placed on trustees under the Codes of Practice including whistleblowing, notifiable events, and internal controls
- Scheme funding including the statement of funding principles, assessing employer covenant and the use of contingent assets
- Risk management, flightplans and de-risking strategy
- Setting investment objectives and strategy
- Liability driven investment
- Investment managers and management

One day

Price: £550 + VAT per person

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- Course materials
- Overnight accommodation following the first day
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Two days

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£1,200 + VAT per person (2 delegates)
£1,150 + VAT per person (3+ delegates)



Defined Contribution

This course is suitable for trustees of a defined contribution scheme or a hybrid scheme with a defined contribution section.

It provides a practical look at the key issues and decisions that trustees face when responsible for a defined contribution scheme, and considers trustees' responsibilities both from a legal and best practice perspective.

Our course covers the following core areas:

- The DC landscape
- Roles and responsibilities of trustees
- The trustee board
- Scheme management skills
- DC administration
- Investment principles, strategy and design of the default fund
- Monitoring and reviewing investment strategy
- Communicating and engaging with members
- Assessing value for members
- Reporting duties
- Pension freedoms and member options

One day

Price: £550 + VAT per person

Our two day residential revision seminar is aimed primarily at helping delegates to demonstrate the skills needed to pass the PMI Award in Pension Trusteeship, an accredited qualification for trustees, as well as updating and consolidating their Trustee Knowledge and Understanding.

The syllabus is closely based on the Pensions Regulator's Guidance for Trustee Knowledge and Understanding (defined benefit schemes with associated defined contribution arrangements) and the Pensions Regulator's Foundation Indicative Syllabus.

The emphasis is on active participation via exercises and informal, lively discussion, leading up to a specially arranged sitting of the PMI APT examination at the end of the course.

The all-inclusive fee covers:

- Attendance at the two day seminar
- A selection of recommended pre-seminar reading material
- Detailed course notes
- Overnight accommodation following the first day
- Meals and refreshments during the seminar
- Examination entrance fee

Two days

Price: £1,475 + VAT per person (1 delegate)

£1,325 + VAT per person (2 delegates)

£1,175 + VAT per person (3+ delegates)

PMI Award in Pension Trusteeship



Pension Governance Committee

Many employers operate contract-based and master trust arrangements (Group Personal Pensions for example), and are increasingly establishing pension governance committees to ensure these arrangements are well-run.

Similar to a board of trustees, a governance committee acts in an advisory capacity to the employer, though it has fewer legal obligations than apply to trustees.

Aon's pension governance committee training is designed specifically to meet the needs of governance committees, identifying best practice and ensuring committee members can carry out their role efficiently.

It is also suitable for HR professionals supporting contract based defined contribution schemes and includes:

- The roles and responsibilities of a governance committee member
- Pension structure and governance
- Running a contract or master trust based plan
- Defined contribution investment: basics
- The risks to defined contribution members
- Defined contribution investment strategies
- Investment choices: defined contribution arrangements
- Communications

Half day

Price: £300 + VAT per person

Defined Benefit
Part 1 ▾

Defined Benefit
Part 2 ▾

Defined
Contribution ▾

Award in
Pension
Trusteeship ▾

Pension
Governance
Committee ▾

Course dates

Pensions
conference ▾

Contact us ▾

Defined
Benefit
Part 1

Defined
Benefit
Part 2

Defined
Contribution

PMI Award in
Pension
Trusteeship

Pension
Governance
Committee

2019

23 January
26 February (Leeds)
17 April
21 May (Birmingham)
24 July
17 September (Leeds)
17 October
26 November

2020

22 January
25 February (Leeds)

2019

6 March
14 May (Manchester)
12 June (Birmingham)
11 September
12 November (Manchester)
11 December

2020

4 March

2019

19 March
19 June
6 November

2020

17 March

2019

13/14 March (Surrey)

2019

13 February
24 September

2020

26 February

NEW FOR 2019

Defined Benefit Trustee Essentials
17/18 July (Northampton)
9/10 October (Surrey)

[Click here to book online](#)

Pensions: evolution, solutions, performance

The Aon Pension Conferences are designed for trustees of pension schemes and pensions, HR and finance professionals who make decisions about their company's pension scheme.

Attendance will offer delegates the opportunity to hear experts' views and ideas on how to manage defined benefit and defined contribution pension schemes and provides a platform to learn from and network with peers.

Delegates can expect to leave with fresh actions for their pension scheme and will receive 4.5 CPD points for full day attendance.



5 Feb 2019 – Manchester

26 Feb 2019 – London

5 Mar 2019 – Bristol

12 Mar 2019 – Birmingham

19 Mar 2019 – Leeds

26 Mar 2019 – Edinburgh

2 Apr 2019 – London



[**Click here to register**](#)

You can keep up with current issues through our teleconferences, roundtables and pensions conferences.

For details, please visit
<http://www.aon.com/unitedkingdom/events.jsp>

If you would like to discuss any further training needs or bespoke courses, please call: +44 (0)1372 733907 or email:
pensionstraining.enquiries@aon.com

Helpful
materials

Visit our website
(<http://www.aon.com/unitedkingdom/retirement-investment/pensions-training/>) for a selection of materials to help you make your first steps as a trustee and to decide what your training requirements are.

Current
issues

Retirement
planning
seminars

Aon provides sessions for employees within 5 years of retirement.

For further information please contact Chris McWilliam on +44 (0)1252 768679 or chris.mcwilliam@aon.com

Contact us

Contacts

For more information contact the Pensions Training team on +44 (0)1372 733907 or pensionstraining.enquiries@aon.com

About Aon

Aon plc (NYSE:AON) is the leading global provider of risk management, insurance and reinsurance brokerage, and human resources solutions and outsourcing services.

Through its more than 66,000 colleagues worldwide, Aon unites to empower results for clients in over 120 countries via innovative and effective risk and people solutions and through industry-leading global resources and technical expertise. Aon has been named repeatedly as the world's best broker, best insurance intermediary, best reinsurance intermediary, best captives manager, and best employee benefits consulting firm by multiple industry sources. Visit aon.com for more information on Aon and aon.com/manchesterunited to learn about Aon's global partnership with Manchester United.

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