



The tools you need to carry out your duties

Pensions training for trustees,
specialists, directors and HR

Pension scheme trustees are required to have a knowledge and understanding of:

- the law relating to pensions and trusts
- the principles relating to scheme funding and investment

Trustees are also required to have a working knowledge of their scheme's governing documents. DC trustees must now report every year on what they have done to meet these requirements.

HR and finance specialists, pensions managers and company directors also need to know about the complex legal framework within which their company's pension scheme operates. Be it scheme funding and investment, governance matters, making changes to a scheme, auto-enrolment or how individuals can access their pension, it is vital that you are aware of your responsibilities.

We run introductory training courses to equip those involved in running defined benefit or defined contribution trust-based schemes to run their scheme effectively. We also offer the PMI's Award in Pension Trusteeship and our bespoke, in-house training.



Introduction to DB pensions

Running a DB scheme

Leeds	20 March	2018
Manchester	20 June	2018
London	19 September	2018



One-day course

£499 +VAT per delegate

This introductory course will help if you need to understand:

- the key elements of the UK pensions system
- the legal powers and duties of DB trustees
- your role and how to run your scheme effectively
- the governance requirements for DB schemes
- the fundamentals of funding and investment for DB schemes
- the pensions regulatory framework for DB schemes and the role of the Pensions Regulator

Who should attend?

- newly appointed trustees
- experienced trustees in need of an update
- HR and finance professionals with pensions responsibilities
- pension managers
- company directors

What previous delegates have said:

"Provides valuable insight into the role of trustee."

MD at KSB UK

"Great course, great value. Loved the small group."

Trustee of the Goodyear Staff Pension Plan

(It is Eversheds Sutherland's policy only to use quotes with delegate permission)

Programme

09:00 registration and coffee, 09:30 start

Nature of trusteeship

- what are trusts?
- the role and responsibilities of trustees
- trustee liability and protection

Running a DB scheme

- governance requirements for DB schemes
- running a trustee meeting
- decision-making and exercising discretions
- managing conflicts of interest
- the role of the trustees and the employer

DB funding and investment

- the statutory funding regime
- understanding your scheme's actuarial valuation
- trustees' investment duties
- fundamentals of investing for DB schemes

The regulatory framework for DB schemes

- the role of the Pensions Regulator and Pensions Protection Fund
- the pensions tax regime
- resolving disputes

16:30 close

Using case-studies we consider common issues associated with running a DB scheme (including exercising trustee discretions and scheme funding negotiations). A guest speaker from the actuarial profession will cover the actuarial and investment aspects of the course.

Winner

Engaged Investor Awards 2016:
Best Trustee Education Provider

Introduction to DC pensions

Running a DC scheme

London

17 October 2018

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CPD

One-day course

£499 +VAT per delegate

This introductory course will help if you need to understand:

- the key elements of the UK pensions system, including auto-enrolment
- the legal powers and duties of DC trustees
- your role and how to run your scheme effectively
- the governance requirements for DC schemes
- the fundamentals of DC investment
- your duties when selecting and monitoring investment funds
- how members of DC schemes can access their savings
- the regulatory framework for DC trust-based schemes and the role of the Pensions Regulator

Who should attend?

- newly appointed trustees
- experienced trustees in need of an update
- HR and finance professionals with pensions responsibilities
- pension managers
- company directors

Winner

UK Pensions Awards 2017:
Pensions Lawyers of the Year

Programme

09:00 registration and coffee, 09:30 start

Nature of trusteeship

- what are trusts?
- the role and responsibilities of trustees
- trustee liability and protection

Running a DC scheme

- member communications
- governance requirements and the Chair's annual statement
- selecting and reviewing your scheme's investment funds
- duties when designing the default fund
- monitoring costs and charges and assessing 'good value'
- how can members access their pension savings?

The regulatory framework for DC schemes

- the role of the Pensions Regulator
- the tax regime for DC pensions
- resolving disputes

Practicalities

- running a trustee meeting
- decision-making and exercising discretions
- managing conflicts of interest

16:30 close

*Using case-studies we consider common issues associated with running a DC scheme (including exercising trustee discretions). **An investment consultant will join us** to cover the actuarial and investment aspects of the course.*

PMI: Award in Pension Trusteeship

Prepare for the PMI exam



Trustees of pensions schemes are under more pressure than ever before. The level of knowledge required has never been higher and it increases all the time. Trustees are required to understand the law relating to pensions and trusts and the principles of funding and investment. The Pensions Regulator also has high expectations, including the encouragement of formal qualifications.

The Pensions Management Institute (PMI) offers the Award in Pension Trusteeship (APT), the most widely recognised trustee qualification in the industry. It provides formal recognition of a trustee's knowledge and understanding in line with the legal requirements.

This course is designed to help trustees achieve the APT qualification by taking you through the comprehensive syllabus.

Our course:

- is led by experienced pension lawyers who have delivered this course to trustees responsible for schemes in a wide range of organisations
- can be customised to meet the needs of your scheme
- can be run over one or two days
- involves working through typical PMI exam questions
- includes a private exam sitting

The course works best when all, or most, members of a trustee board attend together, so that they learn as a group and share experience.

PMI exam structure

Award in Pension Trusteeship (DC and DB Schemes or DC only)

Unit 1: Law and pensions overview

Unit 2: Investment and funding issues for DC and DB pensions (or DC only)

Unit 3: Scheme management issues for DC and DB pensions (or DC only)

It is necessary to pass all three units (although not necessarily at the same time) to be awarded the full qualification.

“Those who are accountable for scheme decisions and activity understand their duties and are fit and proper to carry them out”.

Pensions Regulator

Costs

For up to 12 delegates, the cost is £7,995 for a one-day course, or £12,995 for a two-day course (plus expenses and VAT in either case). In addition, the PMI levies a charge for each candidate (currently with a minimum fee of £2,000) to cover the costs of the examination. We can host the training in one of our UK offices (London, Leeds, Manchester, Cardiff or Birmingham) at no extra cost, or bring it in-house to you.

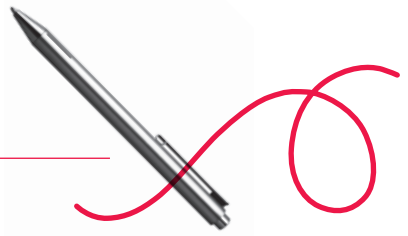
If you are interested in this course please contact us to discuss possible dates and locations:

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In-house training

Tailored for you



Our in-house pensions training will help if you:

- want to better understand your legal obligations
- want to understand how changes in the law will affect your scheme
- need to upskill your trustees or HR team
- want training that is tailored to your scheme
- want advanced training in a particular area

Our bespoke training is ideal for trustee boards, HR or in-house legal teams and boards of directors.

You can choose from a range of topics, including:

- scheme funding and investment
- implementing scheme change
- managing risk (including pension scheme buyouts)
- the pensions aspects of corporate transactions
- equal treatment and discrimination
- disputes and conflicts of interest
- automatic enrolment and re-enrolment
- pension scheme governance
- pensions for HR professionals

We have provided bespoke training to many clients, including:

- the trustees of British Airways' pension schemes
- the trustees of the Threadneedle Pension Plan
- Legal & General

Please contact us and we can design a training course for you.

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Ways to book



eversheds-sutherland.com/training

Discounts available for online payments and multiple bookings



training@eversheds-sutherland.com



For further information or support, please call: **+44 113 200 4040**

Further information

Booking conditions

It is a condition of attendance that the course fee has been pre-paid. Your booking will be confirmed in writing within five working days of our receiving your completed booking form. If you do not receive confirmation within ten days, please telephone us on **+44 113 200 4040**.

Joining instructions

These are issued by email direct to the delegate one week before each course.

Cancellation policy

Any cancellation must be notified at least two weeks prior to the seminar date otherwise you will be charged for the place. Alternatively a substitute can attend at no extra cost.

CIPD and CMI members and SRA CPD

Our courses can form part of your SRA, IOSH, CIPD, CMI and Pensions Management Institute CPD.

Church House, London 7 December 2017

12th annual pensions conference

Pensions fairness Whose responsibility?

The BHS case demonstrated that pensions issues can cause employer brand and reputational challenges even after a business has been sold. This conference considers key developments of the last 12 months and the consequences for trustees, employers and product providers.



Contact **nicholasedwards@eversheds-sutherland.com** for more information.

Speakers include:

Minister of State for Pensions

(To be reconfirmed)

Trish Curry *Regional Head UK, AustralianSuper*

Paul Johnson *Director, Institute for Fiscal Studies*

Emma King *Partner, Eversheds Sutherland (and adviser to the BHS Trustees)*

Nicola Parish *Executive Director of Frontline Regulation, The Pensions Regulator*

Gerard Riemen *Managing Director, Federation of the Dutch Pension Funds (Pensioenfederatie)*

Ruston Smith *Chairman of Tesco Pension Fund and Tesco Pension Investment*

One-day
conference
£479
+VAT

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