

Trustee training from training professionals

lively  
informative  
accurate  
interactive  
practical



“First rate! Two lively and informative trainers made this complex subject easy to digest.”

Trustee and Engineer, engineering company

“I had expected to learn, which I did, but had not expected to enjoy it, which however I certainly did.”

Roger Bambrough, Chairman of Trustees and Non-Executive Director, Laura Ashley Holdings Plc

“I would unreservedly commend this course to any Trustee – regardless of their experience.”

Gerard Smart FCA, Chairman of Trustees

“For me, what made it relevant were the ‘war stories’. This really helped with the practical application.”

Trustee and HR Manager, consulting company

## Trustee training by training professionals



Chairman



Chief Executive

We founded the Trustee and Pension Management Association in 2005 to provide professional training for pension scheme trustees.

Our objectives in providing training are to make our courses:

- Accurate
- Informative
- Practical
- Lively and interactive

Our training team is made up of specialists in adult education and is very experienced in financial services and pensions training. The training is provided by training experts Emile Woolf International Ltd, whose clients include PricewaterhouseCoopers, Ernst & Young and a number of FTSE 100 companies. TPMA also draws, where appropriate, on experienced external speakers.

Accompanying our courses is our comprehensive 295 page 'Pension Trustee Guide', covering all aspects of the Pensions Regulator's 'Trustee Knowledge and Understanding' requirements. All courses provide a certificate of attendance for inclusion in your training log.

We have a wide range of courses to help you meet your obligations as a trustee. Our training record speaks for itself: 100% of course participants to the end of June 2007 rate our courses as excellent or good.

As an association we offer ordinary membership to interested parties.

**Please take the time to read our brochure and for further information call us on 01483 479 394, email [info@tpmaglobal.com](mailto:info@tpmaglobal.com) or visit our website at [www.tpmaglobal.com](http://www.tpmaglobal.com)**

accurate lively informative practical interactive

## So you're thinking of becoming a pension trustee?

<b>Suitable for</b>	Those considering taking on the role of pension scheme trustee. We run courses for the trustees of both defined benefit and defined contribution schemes. It may be particularly appropriate for people deciding whether or not to accept a nomination or appointment as a member-nominated trustee.
<b>Duration</b>	½ day
<b>Locations</b>	Various – see booking form or our website for details.
<b>Course overview</b>	<p>Areas covered on this course are:</p> <ul style="list-style-type: none"><li>· The role of a pension scheme trustee</li><li>· Duties and responsibilities of trustees</li><li>· Risks of being a trustee</li><li>· What information to ask for prior to becoming a trustee</li><li>· What information to ask for on appointment</li><li>· Introduction to pensions</li><li>· Outline of the role of the Pensions Regulator including an explanation of the Trustee Knowledge and Understanding requirements and the other codes of practice.</li></ul>

## Trustee knowledge and understanding

**Suitable for** New and experienced trustees.

**Duration** 1 day (intensive)  
2 day (moderate pace)

Courses for defined benefit and defined contribution are available.

**Locations** Various – see booking form or our website for details.

**Course overview** This course addresses the knowledge and understanding requirements. In addition to a certificate of attendance, course participants are encouraged to take our online examination, which upon successful completion produces a further certificate.

Accompanying the course is a complimentary copy of the TPMA Pension Trustee Guide, a comprehensive 295 page supporting book written in a form that is easy to understand.

The course covers the following syllabus:

- Pension schemes
- Pension schemes – the regulatory framework
- Trust law and trustees
- Taxation and pensions
- New trustees – relevant scheme documents
- Organisation and administration
- Disclosure of information and reporting to the regulator
- Investment
- Principles of investment
- The investment process
- Scheme funding
- The quality of the employer covenant
- Discharging scheme liabilities – transfers and winding up

## Chairing pension trustee meetings – a course for chairpersons

<b>Suitable for</b>	Any trustee acting or considering acting as a chairperson.
<b>Duration</b>	1 day
<b>Locations</b>	Various – see booking form or our website for details.
<b>Course overview</b>	<p>The course is intended to enable chairpersons to understand the important role of chairing a trustee board. External speakers are also involved in the course to examine current topics such as assessing the employer covenant and the latest investment tools available to trustees.</p> <p>The course covers a broader range of skills and areas of interest over and above our usual trustee training courses. Areas covered on this course are:</p> <ul style="list-style-type: none"><li>· Special provisions covering the role of chairpersons</li><li>· The chairperson – working with the sponsoring employers</li><li>· Developing a trustees’ business plan and risk register</li><li>· Developing scheme governance</li><li>· Use of sub-committees</li><li>· Record keeping of meetings and secretarial support to the trustees</li><li>· Managing conflicts</li><li>· Managing advisers</li></ul> <p>The course allows time for discussion and questions throughout.</p>

## Trustee knowledge and understanding – refresher

<b>Suitable for</b>	Experienced trustees or trustees who have previously attended our 'Trustee knowledge & understanding' course.
<b>Duration</b>	½ day (intensive) 1 day (moderate pace)
<b>Locations</b>	Various – see booking form or our website for details.
<b>Course overview</b>	<p>The Pensions Regulator's code of practice on Trustee Knowledge and Understanding requires trustees to keep their knowledge up to date. This course is intended to update previous course attendees on any changes in legislation or guidance.</p> <p>An update to the TPMA 'Pension Trustee Guide' is also provided as part of this course, along with a certificate of attendance.</p>

## Pension scheme investment

<b>Suitable for</b>	Trustees wishing to understand more about investment, both in general investment terms and also investment strategy. This course also features experienced investment advisers or managers.
<b>Duration</b>	1 day
<b>Locations</b>	Various – see booking form or our website for details.
<b>Course overview</b>	<p>Areas covered on this course are:</p> <ul style="list-style-type: none"><li>· The investment universe</li><li>· The investment process</li><li>· Risk</li><li>· Managing scheme assets</li><li>· Overall investment trends</li><li>· Liability-driven investment</li><li>· Equity and bond investment</li><li>· Swaps</li><li>· Latest trends</li></ul>

## Actuarial valuations and assessing the employer covenant

<b>Suitable for</b>	Trustees or chairpersons of defined benefit schemes about to undertake a scheme specific funding valuation. External professionals experienced in actuarial and employer covenant issues are also invited to speak and are available to answer any questions.
<b>Duration</b>	½ day
<b>Locations</b>	Various – see booking form or our website for details.
<b>Course overview</b>	<p>Areas covered on this course are:</p> <ul style="list-style-type: none"><li>· Background to actuarial valuations</li><li>· Types of actuarial valuation</li><li>· Setting assumptions</li><li>· Roles of:<ul style="list-style-type: none"><li>– Trustees</li><li>– Employers</li><li>– The Pensions Regulator</li></ul></li><li>· Assessing the employer covenant</li></ul>

## Trustee training – tailored to your pension scheme

**Suitable for** Any trustee board seeking training on a specific area or areas.

**Duration** As agreed

**Locations** Nationally

**Course overview** We can provide tailored training to meet your exact requirements.

Perhaps there are some issues facing the scheme on which you would like some training before you need to make particular decisions – for example in the context of corporate transactions, benefit changes or proposals for the closure or wind-up of the scheme.

Whatever your requirements, from business planning to scheme investments, our experienced team will help you to develop a training plan to meet your needs.



Please visit [www.tpmaglobal.com](http://www.tpmaglobal.com) for course details and to book online

**TPMA, Crowthorne Enterprise Centre, Crowthorne Business Estate  
Old Wokingham Road, Crowthorne, Berkshire RG45 6AW**

**Telephone: 01344 751675 · Fax: 01344 751679 · Email: [info@tpmaglobal.com](mailto:info@tpmaglobal.com)**