

IIPM Law & Governance Programme for Trustees

A professional certification suitable for all pension
scheme trustees

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Outline of the Course

- Trust Arrangements
- Trustees
- Trustee Liability
- Pension Scheme Compliance
- Scheme Wind-up
- Implementing Effective Scheme Governance
- Financial Governance
- Trustee Meetings

Content (in context)

- Background to pensions
- What a trustee does - day to day - limits, powers
- Responsibilities - legal, liability, guidance
- Documentation - knowing their way around various deeds, etc.
- Legislation - Pensions Act, Taxes Act, Revenue limits
- Communication
- Amendments and Winding up

Content (continued)

- Pensions Ombudsman
- Equality
- Governance as a discipline, governance plans, risk evaluation, conflicts
- Financial Governance – projections, funding
- Financial Governance – investment principles
- Trustee meetings
- Dealing with advisers, regulators, members
- Administration and management

Structured Delivery

Week 1		
Day 1	8:30am to 4:30pm	Day 2
Week 2 to 4		
Assignment preparation and reading		
Week 5		
Day 3	8:30am to 4:30pm	Day 4
Week 6 to 7		
Reading		
Week 8		
Examination		

Day 1		Day 2
Background to pensions	8.30 – 10.00	Financial governance – projections, funding
What a trustee does - day to day, limits, powers	10.15 – 11.45	Legislation - Pensions Act, Taxes Act, Revenue limits
Discussion: sharing experiences	12.00 – 12.30	Assignment: briefing and planning
Lunch		Lunch
Responsibilities - legal, liability, guidance	13.00 – 14.30	Communication
Documentation	14.45 – 16.15	Dealing with advisers, regulators, members
Wrap up	16.15 – 16.30	Assignment Allocation and Wrap up

Day 3		Day 4	
Pensions Ombudsman	8.30 – 10.00	Amendments and Winding up	
Financial Governance – investment	10.15 – 11.45	Governance as a discipline	
Feedback on assignment	12.00 – 12.30	Case study	
Lunch		Lunch	
Equality	13.00 – 14.30	Trustee meetings	
Case Study	14.45 – 16.15	Administration and Management	
Wrap up	16.15 – 16.30	Debate and feedback	
		Wrap up at 5pm	

Assessment, Examination & CPD

- 40% for Assessment & Lectures
- 60% for examination
- Level 8 QQI and ECTS Credits 10
- The first course commences on 4/5 April
- The cost is €1,950 including materials and lunches
- IIPM will provide CPD access to successful participants to maintain their certification

Course Delivery by NCI



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- Differences between level 8 versus level 7
- College learning environment & facilities
- Delivery methods – flexibility, in-company, lecturers
- Outcomes
- Diploma in Pensions Management & Policy