

# ESSENTIAL TRAINING FOR PEOPLE IN PENSIONS 2017



## **Achieve Your Potential**

We provide education and professional development opportunities for pensions' industry participants whatever their chosen discipline.

**96% OF ATTENDEES PROVIDING FEEDBACK  
RATE OUR TRAINING EXCELLENT OR GOOD**



# THE PENSIONS CERTIFICATE PROGRAMME

Gain recognition for your learning by completing the Pensions Certificate Programme. Choose and book two of the three foundation modules and two secondary modules. Pass each of the end tests and get your Pensions Certificate.

*Don't need the full programme? All the courses are available to book individually.*

## 1/2 DAY

### PENSIONS BASICS

*(Foundation Module 1 of the Pensions Certificate Programme)*

#### WHAT IS IT FOR?

To introduce the basic principles of UK pensions.

#### WHO IS IT FOR?

Anyone new to pensions, HR personnel, and new trustees

#### WHAT WILL I LEARN?

- ◆ Background to the UK pensions system
- ◆ Why have employer pensions?
- ◆ State pensions
- ◆ Workplace pensions, their benefit structures and characteristics and how they compare
- ◆ Where and how to find out more information about pensions

## 1/2 DAY

### RETIREMENT GUIDANCE – SUPPORTING EMPLOYEES

*(Foundation Module 2 of the Pensions Certificate Programme)*

#### WHAT IS IT FOR?

To highlight key information for those who are considering accessing their retirement savings.

#### WHO IS IT FOR?

Anyone new to pensions, HR personnel, and those responsible for providing information to employees who are considering accessing their retirement savings.

#### WHAT WILL I LEARN?

- ◆ What employees need to think about in terms of their finances in retirement
- ◆ Sources of retirement income - state, workplace and personal pensions, and other sources of income
- ◆ Workplace pensions - outcomes
- ◆ Other sources of savings eg bank/building society accounts, and ISA's
- ◆ Factors which impact on retirement savings eg scheme type, the employee's choice of outcome, and taxation
- ◆ Where to gain more information

## 1/2 DAY

### UNDERSTANDING INVESTMENT

*(Foundation Module 3 of the Pensions Certificate Programme)*

#### WHAT IS IT FOR?

To understand the basic principles of pension scheme investment.

#### WHO IS IT FOR?

Anyone who is new to investment and needs to understand the basics.

#### WHAT WILL I LEARN?

- ◆ Why pension schemes invest and the factors that influence investment performance
- ◆ The range of investments used by pension schemes and their relative characteristics and risks
- ◆ How to contrast and compare the varieties of investment management and strategies available to pension schemes

## ◆◆ VERY ENJOYABLE THOUGHT PROVOKING SESSION, THANKS ◆◆

Leanne Grovett, Cubic Transportation Systems Ltd

# 1 DAY

## TALKING TO EMPLOYEES ABOUT SAVING IN A WORKPLACE PENSION

*(Secondary Module 4 of the  
Pensions Certificate Programme)*

### WHAT IS IT FOR?

To help individuals talk to employees about workplace pension saving.

### WHO IS IT FOR?

Anyone who has to discuss pensions with employees.

### WHAT WILL I LEARN?

- ◆ How to provide support to employees on planning and saving for retirement through a workplace pension and the boundaries for providing financial information and guidance
- ◆ Key facts to include in a communications strategy, in particular on induction and at-retirement
- ◆ Meeting and presentation techniques
- ◆ Where to go for additional support and information

# 1 DAY

## MANAGING CHANGE IN A WORKPLACE PENSION

*(Secondary Module 5 of the  
Pensions Certificate Programme)*

### WHAT IS IT FOR?

To identify the main components needed to develop a workplace pensions' strategy.

### WHO IS IT FOR?

HR personnel and anyone who has to implement changes to workplace pension arrangements.

### WHAT WILL I LEARN?

- ◆ Factors driving a pensions strategy
- ◆ How pension arrangements are financed
- ◆ What the UK workplace pensions market looks like
- ◆ The main factors to look out for when appointing a pensions provider
- ◆ Key actions involved when restructuring or implementing a new pension arrangement



# TRUSTEE COURSES

The Pensions and Lifetime Savings Academy offers a range of training opportunities for trustees. Its two one-day courses taken together provide a comprehensive introduction to the world of pension scheme trusteeship.

## 1 DAY

### INTRODUCTION TO TRUSTEESHIP PART 1 - THE THEORY

#### WHAT IS IT FOR?

To explain the theory behind pension scheme trusteeship.

#### WHO IS IT FOR?

New trustees.

#### WHAT WILL I LEARN?

- ◆ Pension trustee duties, responsibilities and powers and how trustees aim to protect themselves against legal challenge, the main advisers trustees use and the nature of advice each category of adviser provides
- ◆ How workplace pension schemes are financed and how DB schemes value their assets and liabilities
- ◆ Key investment responsibilities for trustees
- ◆ Good governance practices for both DB and DC trustees

## 1 DAY

### INTRODUCTION TO TRUSTEESHIP PART 2 - THE PRACTICE

#### WHAT IS IT FOR?

To explain key trustee practice.

#### WHO IS IT FOR?

New trustees who understand the principles of the pension trustee role (or anyone who has completed Introduction to Trusteeship Part 1).

#### WHAT WILL I LEARN?

- ◆ The difference between duties and discretions
- ◆ What the law expects of trustees when taking decisions
- ◆ Key principles of trustee delegation and managing delegates
- ◆ Appointment of advisers
- ◆ How to identify pitfalls which may occur in scheme member communications
- ◆ The importance of building a good relationship with the sponsoring employer
- ◆ What are conflicts of interest and ways to manage conflicts

◆◆ **THE TWO INTRODUCTORY TRUSTEE COURSES COMBINED PROVIDE A VERY SOUND FOUNDATION FOR A NEW TRUSTEE** ◆◆

Paul Edwards, Babcock International Group

# PLUS

## ADDITIONAL TRUSTEE TRAINING

During 2017, the Academy will continually be adding training courses to its programme. This will include sessions for anyone considering becoming a trustee, and short trustee workshops sponsored and delivered by industry experts.

Visit [www.plsa.co.uk/training](http://www.plsa.co.uk/training) for more information.

## CFA INSTITUTE INVESTMENT FOUNDATIONS CERTIFICATE



CFA Institute

### WHAT IS IT FOR?

This web-based programme, provided in conjunction with CFA Institute, offers a clear insight into investment industry essentials. Consisting of seven distinct modules and easy to follow self-study interactive learning of around 100 hours, the programme culminates in a multiple choice examination taken at test centres across the UK. Successful candidates are awarded the CFA Institute Investment Foundations Certificate.

### WHO IS IT FOR?

Trustees, those who support Chief Investment Officers and their teams and pensions industry practitioners.

### WHAT WILL I LEARN?

The programme aims to raise competence, provide access to global standards across a range of functions and ensures that learners improve their knowledge and understanding of investment practice.

◆◆ **VERY WELL DELIVERED,  
COVERED A LOT OF THINGS** ◆◆

Fred Brown, NASUWT



# PENSION PRACTITIONERS

## 1 HOUR

### TEACH-INS FOR PENSION PRACTITIONERS

Our expert pension practitioner ‘teach-ins’ lasting one hour, are held at the offices of the Pensions and Lifetime Savings Association in London, in the early morning or evening. Opportunities also exist to sponsor these sessions.

Sessions will focus on legal matters, DB funding, administration, DC governance or investment and may also introduce new legislation, concepts or ideas.

Run by industry experts, the teach-ins will cover key essentials in quick but detailed bite-sized chunks. They are especially suitable for pensions professionals who need to learn about new pension initiatives, find out more about topics which they may not normally come across in their pensions role, or simply expand their professional development and expertise.

Teach-ins qualify for CPD under the PMI CPD Scheme and may qualify under the schemes of other professional bodies.

## 1 DAY

### LGPS PENSION BOARD SEMINARS

#### WHAT IS IT FOR?

The Public Sector Pensions Act 2013 gives Pension Boards the responsibility to assist administering authorities (scheme managers) and to secure compliance with the LGPS regulations. This responsibility is impacted by other legislation relating to the governance and administration of the LGPS and the Pensions Regulator’s requirements for the LGPS. Its purpose is to ensure governance and administration in the LGPS is effective and efficient. This seminar will inform those individuals who are LGPS Pension Board members, or potential Board members about these responsibilities and how the wider pensions landscape influences Pensions Board activity.

#### WHO IS IT FOR?

LGPS Pension Board members, or potential Board members. The seminar may also be helpful to LGPS Pension Committee members and local councillors with an interest in LGPS management structures.

#### WHAT WILL I LEARN?

After attending the seminar you will:

- ◆ Recognise what is required from a Pension Board member and Chair
- ◆ Be familiar with the knowledge and skills necessary to act effectively as a Pensions Board member
- ◆ Demonstrate an awareness of the role and purpose of the Scheme Advisory Board (SAB) and Local Pension Boards
- ◆ Identify what constitutes good governance in the LGPS
- ◆ Be able to describe key issues which are currently affecting the LGPS
- ◆ Recognise how matters which affect defined benefit schemes, in general, impact upon the LGPS



# 2 HOURS

## RETIREMENT GUIDANCE FOR EMPLOYERS

This short seminar has been specifically designed for those employers wanting to offer support and information to employees when they are ready to consider accessing their retirement savings. It will inform employers about the issues employees should consider, and how employers can signpost employees to other sources of help.

### WHO SHOULD ATTEND?

The seminar is suitable for employers who want to find out more about the guidance required by employees who are thinking about retiring or accessing their retirement savings.

### WHAT TOPICS ARE COVERED?

- ◆ Employee awareness – what employees need to think about in terms of their finances in retirement
- ◆ Creating policies for changing work patterns
- ◆ Sources of retirement income - state, workplace and personal pensions, and other sources of income
- ◆ Workplace pensions - outcomes
- ◆ Other sources of savings eg bank/building society accounts, and ISA's
- ◆ Factors which impact on retirement savings eg scheme type, the employee's choice of outcome, and taxation

## WEBINARS

Making a trip to our offices in London is not convenient for everyone. Therefore, 2017 will see the introduction of webinars covering topics ranging from investment, new regulation, DB funding, DC Governance and much more. Generally lasting no more than 45 minutes our educational webinars will be fully interactive. You'll be able to take part from your home, office, or while you are travelling and ask questions in real time.

Visit [www.plsa.co.uk/training](http://www.plsa.co.uk/training) for more information



# LEADERSHIP AND PROFESSIONAL DEVELOPMENT

## LEADERSHIP FOR MANAGERS PROGRAMME

### WHAT IS IT FOR?

To enhance personal impact and professional standing within the pensions industry. Participants work on real-life issues from their own workplace to develop their leadership, influencing and decision-making skills.

### WHO IS IT FOR?

Pensions industry professionals new to management or experienced managers interested in refreshing their skills.

### WHAT WILL I LEARN?

After completing the programme you will be able to:

- ◆ Recognise why there is a need for self-aware influential leaders
- ◆ Determine how your degree of influence is identified in your own organisation
- ◆ Identify your own learning and development priorities
- ◆ Demonstrate an awareness of how to understand colleagues needs individually and in teams, and how to influence this
- ◆ Recognise how improving your influencing skills and personal impact will resolve real issues from your workplace
- ◆ Identify and address your possible communication and information blindspots
- ◆ Identify solutions for your real-life workplace issues and strategies for dealing with them
- ◆ Create realistic and sustainable personal development strategies

# IN-HOUSE, TAILORED AND BESPOKE TRAINING

If you have a number of people who require the same training, we can deliver an existing course at your location. Alternatively we can tailor courses or produce a bespoke programme for you.

### WHY IN-HOUSE TRAINING?

- ◆ Cost-effective – no staff travelling costs and more economical per head\*
- ◆ Reduce time out of the office – as we will come to you there's no travelling for your team
- ◆ Relevance – tailor the course to suit your needs

\*typical when booking for 5 or more people



# COURSE DATES & FEES

COURSE	2017 DATES	COURSE FEE	PROGRAMME FEE
<b>PENSION CERTIFICATE PROGRAMME</b> (select two foundation and two secondary courses from the introductory courses)			<b>£1,215</b> members <b>£1,875</b> non-members
<b>INDIVIDUAL INTRODUCTORY COURSES</b>			
<b>PENSION BASICS</b> (Foundation module 1 of the Pension Certificate Programme)	<b>09 February</b> <b>27 September</b> 10:00-13:00	<b>£295</b> members <b>£465</b> non-members	
<b>RETIREMENT GUIDANCE SUPPORTING EMPLOYEES</b> (Foundation Module 2 of the Pension Certificate Programme)	<b>09 February</b> <b>27 September</b> 14:00-17:00	<b>£295</b> members <b>£465</b> non-members	
<b>UNDERSTANDING INVESTMENT</b> (Foundation Module 3 of the Pension Certificate Programme)	<b>28 February</b> <b>28 September</b> 10:00-13:00	<b>£295</b> members <b>£465</b> non-members	
<b>TALKING TO EMPLOYEES ABOUT SAVING IN A WORKPLACE PENSION</b> (Secondary Module 4 of the Pension Certificate Programme)	<b>04 April</b> <b>04 October</b> 10:00 -16:00	<b>£515</b> members <b>£870</b> non-members	
<b>MANAGING CHANGE IN WORKPLACE PENSIONS</b> (Secondary Module 5 of the Pension Certificate Programme)	<b>19 May</b> <b>29 November</b> 10:00 -16:00	<b>£515</b> members <b>£870</b> non-members	
<b>TRUSTEE</b>			
<b>INTRODUCTION TO TRUSTEESHIP PART 1 - THE THEORY</b>	<b>02 March</b> <b>03 May</b> <b>06 June</b> <b>20 September</b> <b>11 October</b> <b>02 November</b> 10:00-16:00	<b>£470</b> members <b>£835</b> non-members	
<b>INTRODUCTION TO TRUSTEESHIP PART 2 - THE PRACTICE</b>	<b>14 March</b> <b>04 May</b> <b>26 September</b> <b>14 November</b> 10:00-16:00	<b>£470</b> members <b>£835</b> non-members	
<b>CFA INSTITUTE INVESTMENT FOUNDATIONS CERTIFICATE</b>			<b>\$200</b>

All fees are excluding VAT

All training takes place at the PLSA offices in London

## COURSE DATES & FEES

COURSE	2017 DATES	COURSE FEE	PROGRAMME FEE
<b>LEADERSHIP AND PROFESSIONAL DEVELOPMENT</b>			
<b>LEADERSHIP FOR MANAGERS</b>	Workshops <b>18 January</b> <b>13 July</b> <b>15 November</b>  Action Learning Meetings <b>01 March</b> <b>25 May</b> <b>21 September</b> <b>10 October</b>  Networking Dinner <b>14 November</b>		<b>£2,900</b> members <b>£4,795</b> non-members Fee includes all 8 dates
<b>PENSION PRACTITIONERS</b>			
<b>TEACH-INS</b>	Morning sessions <b>07 February</b> <b>28 March</b> <b>24 April</b> <b>09 May</b> <b>26 June</b> <b>06 September</b> <b>05 October</b> <b>01 November</b>  Afternoon sessions <b>25 January</b> <b>28 February</b> <b>15 March</b> <b>05 April</b> <b>06 July</b> <b>24 October</b> <b>16 November</b>	Free to members <b>£100</b> non-members	
<b>LGPS PENSION BOARD TRAINING</b>	<b>06 April</b> <b>11 July</b> <b>19 September</b> <b>08 November</b>	<b>£260</b> members <b>£475</b> non-members	
<b>RETIREMENT GUIDANCE EMPLOYER SEMINARS</b>	<b>11 May</b> <b>04 July</b> <b>04 September</b> <b>11 December</b>	Free to members <b>£475</b> non-members	

All fees are excluding VAT

All training takes place at the PLSA offices in London





Cheapside House,  
138 Cheapside,  
London EC2V 6AE

T: 020 7601 1700  
E: [plsa@plsa.co.uk](mailto:plsa@plsa.co.uk)

[www.plsa.co.uk/training](http://www.plsa.co.uk/training)

