

Trustee Training Course Summary

As an employer and a pension trustee, there are many legal and financial implications to your company pension scheme.

The aim of our courses is to help you meet your obligations under the relevant legislation but also to improve your practical understanding of the duties and responsibilities of a Pension Plan Trustee.

The detail and scope of the training will depend on the size of your scheme. Our courses are tailored to be most relevant to you.

The courses are delivered onsite by one of our experienced trainers. They involve short multiple choice assessments at the end of each module.

Upon successful completion of the assessments, each participant will be awarded a certificate. Full course slides and notes are provided.

Courses cost from €500 to €1500 depending on the size of the scheme and the number of attendees.



Making Sense of Trustee Legislation

Course Content Summary

Trusteeship Information:

- ▶ Background to Pension Provision & the need for Trustees
- ▶ The Role & Duties of a Trustee

Investment & Fund Management:

- ▶ Overview of asset classes, types of investment management and investment funds.
- ▶ Trustee Responsibilities

Member Communication:

- ▶ Pensions Act Disclosure requirements
- ▶ Explanation of relevant booklets, statements & reports

Administration:

- ▶ Pensions Board requirements
- ▶ Record Keeping
- ▶ Scheme accounts & financial requirements

Regulation & Compliance:

- ▶ Pensions Act 1990 & The role of the Pensions Board
- ▶ Penalties, Whistleblowing & Complaints
- ▶ Family & Employment Law

To Book Your Course
or to get a personalised proposal,
get in touch today!



1890 88 20 61



hello@hopkins-financial.ie