



# Pensions Training 2023/24

Prepared for: Those involved in managing pension schemes

Prepared by: Aon

Date: 1 August 2023

# Knowledge and understanding

The Pensions Regulator requires trustees of pension schemes to ensure they have the skills, knowledge and understanding needed to perform their roles effectively.

## Our courses

Whether you are new to pensions (with 6 months to build up the relevant knowledge and understanding) or have some experience; and whether you manage Defined Benefit or Defined Contribution schemes, our courses aim to support you in building your knowledge and understanding.

We offer:

- A Defined Benefit course in two parts:
  - Part 1 - for new trustees
  - Part 2 - for those who have attended Part 1, or who have more experience
- Two separate Defined Contribution courses:
  - Defined Contribution - for trust-based schemes; and
  - Pension Governance Committee – for contract-based or master trust arrangements

Read on to find out more, including how to book your place.

We look forward to receiving your registration.

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Read on to find out more about our programme and other resources to support you.



### Action

[Click here](#) to register in 2023

[Click here](#) to register in 2024



# Defined Benefit Courses



## Defined Benefit Part 1

This introductory course is suitable for new trustees and as a refresher for those with more experience. It will help you gain a clear understanding of your responsibilities as a trustee.



## Defined Benefit Part 2

This course is suitable for more experienced trustees who have either already attended the Defined Benefit – Part 1 course or have some experience as a trustee of a defined benefit scheme. It assumes an understanding of the basic concepts of trust law and trusteeship and some knowledge of asset classes and investment markets.



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# Defined Contribution Courses



## Defined Contribution

This course is aimed at trustees of a defined contribution scheme or a hybrid scheme with a defined contribution section.

It provides a practical look at the key issues and decisions that trustees face when responsible for a defined contribution scheme and considers trustees' responsibilities both from a legal and best practice perspective.



## Pension Governance Committee

Many employers operate contract-based and master trust arrangements (Group Personal Pensions for example) and are increasingly establishing pension governance committees to ensure these arrangements are well-run.

This course is designed specifically to meet the needs of governance committees, identifying best practice and ensuring committee members can carry out their role efficiently.

It is also suitable for HR professionals supporting contract based defined contribution schemes.



## Action

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# Dates and Prices



## Defined Benefit Part 1 – seminar or webinar, equivalent to one day

### 2023

15-16 August – Webinar (a.m.)  
31 October – London

### 2024

23-24 January – Webinar (a.m.)  
20 March – London  
5 June – London  
3-4 September – Webinar (a.m.)  
6 November – London

**Price: £550 (London Seminar) / £450 (Webinar) + VAT**



## Defined Benefit Part 2 – seminar or webinar, equivalent to one day

### 2023

12-13 September – Webinar (a.m.)  
5 December – London

### 2024

27-28 February – Webinar (a.m.)  
23 April – London  
17 July – London  
8-9 October – Webinar (a.m.)  
11 December – London

**Price: £550 (London Seminar) / £450 (Webinar) + VAT**



## Defined Contribution – seminar

### 2023

26 September – London

### 2024

6 March – London  
16 October – London

**Price: £550 + VAT**



## Pension Governance Committee – half day

### 2023

28 November – London (a.m.)

### 2024

21 May – Webinar (a.m.)

26 November – London (a.m.)

**Price: £350 (London Seminar) / £300 (Webinar) + VAT**

All London seminars include lunch and refreshments.

Subject to interest, we may schedule additional dates in other locations. Please contact us if this may be of interest.

\* Price increase of £50 will be effective from 1 January 2024, therefore courses booked before this date will be charged at the lower 2023 rate.



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# Trustee effectiveness

Being a trustee doesn't just require knowledge and understanding – it takes time, skills and experience

Our suite of trustee effectiveness tools addresses the Pensions Regulator's thinking on trusteeship and governance and helps with areas such as:

- Reviewing current trustee effectiveness
- Understanding the balance of personalities
- Understanding the personal attributes, skills and experience
- Improving trustee group decision making
- Organising trustee meeting agendas and maximising the time between meetings
- Challenging advisers



**Further information**

[Click here](#) to explore our Trustee Effectiveness Toolkit

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# Additional Resources



## Further help

Find helpful materials on our website <http://www.aon.com/unitedkingdom/retirement-investment/pensions-training>

Contact us to discuss your training needs or bespoke courses:

- +44 (0)1372 733907
- [pensionstraining.enquiries@aon.com](mailto:pensionstraining.enquiries@aon.com)



## Current issues

To keep up with current issues:

- Sign up to one of our events at <https://www.aon.com/unitedkingdom/events/default.jsp>
- Subscribe to our podcast: <https://www.aon.com/unitedkingdom/retirement-investment/retirement-market-update/default.jsp>



## Retirement planning seminars

Aon provides sessions for employees within 5 years of retirement.

For further information please contact Chris McWilliam:

- +44 (0)1252 768679
- [chris.mcwilliam@aon.com](mailto:chris.mcwilliam@aon.com)



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