

TRUSTEE TRAINING PROGRAMME

REGISTERED WITH THE PENSIONS AUTHORITY

4 HOURS FORMAL CONTINUOUS PROFESSIONAL DEVELOPMENT (CPD)

WHY ARE WE OFFERING THIS COURSE?

With effect from 1 February 2010, all trustees of pension schemes are required to receive formal trustee training.

- Existing trustees must undertake trustee training every 2 years
- New trustees must undergo training within 6 months of being appointed

DID YOU KNOW?

Where a trustee fails to undertake the required training, the Pensions Authority may apply an on-the-spot fine of up to €2,000.

IS OUR TRUSTEE TRAINING COURSE REGISTERED WITH THE PENSIONS AUTHORITY?

Yes, our trustee training programme has been registered with the Pensions Authority.

Attendees will be awarded 4 hours formal CPD and will also receive a Trustee Training Certificate.

This training course is only available to Trustees whose pension arrangements are with Irish Life Corporate Business.

WHAT WILL THE COURSE COVER?

This programme is designed to cover all of the areas recommended by the Pensions Authority.

The course is conducted over one day and covers the content outlined overleaf. It will also provide you with the opportunity to network with experts and your peers.

DETAILED COURSE CONTENT

1. Who can and cannot be a trustee, trustee duties and responsibilities, fines and prosecutions, extent of trustee liability, who are the possible beneficiaries, trustee governance and discretionary powers.
2. Trustee investment duties, investment regulations, types of investment risk, risk and return, setting investment objectives for defined benefit and defined contribution schemes, statements of investment policy principles, statutory funding requirements for defined benefit schemes. Active/passive investment management, default funds, performance targets for investment managers.
3. Pensions administration, disclosure of information regulations, timelines for providing information, the importance of member communications, Revenue limits, Registered Administrators, the role of the Pensions Authority and the Pensions Act.
4. Member trustees, standard arrangements and alternative arrangements.
5. Approved Retirement Funds, Pension Adjustment Orders, internal dispute resolution procedures and the Pensions Ombudsman.

PROGRAMME DELIVERY

This training programme has been devised and will be presented by highly-experienced practitioners who are fully conversant with all pension issues. This will be a participative and interactive course which includes discussions to reinforce the programme themes.

WHAT IS THE COST?

There is a charge of €200 per delegate, for a one day course.

REGISTRATION AND PAYMENT DETAILS

Name	<input type="text"/>
Email	<input type="text"/>
Telephone	<input type="text"/>
Job Title	<input type="text"/>
Trustee	<input type="radio"/> Potential Trustee <input type="radio"/> Company Executive <input type="radio"/> Company Staff <input type="radio"/> Other
Title of Pension Scheme	<input type="text"/>
Pension Scheme Number	<input type="text"/>
Type	Defined Benefit <input type="radio"/> Defined Contribution <input type="radio"/>
Employer Name	<input type="text"/>
Address	<input type="text"/>

I consent to the holding (on computer or otherwise) of all information provided by me in relation to the provision of this service and its disclosure to all necessary persons. Please tick this box to signify acceptance of this.

Booking Details

I would like to attend a one-day course

- | | |
|--|---|
| <input type="radio"/> 27 January 2017 | <input type="radio"/> 30 June 2017 |
| <input type="radio"/> 24 February 2017 | <input type="radio"/> 29 September 2017 |
| <input type="radio"/> 31 March 2017 | <input type="radio"/> 20 October 2017 |
| <input type="radio"/> 26 May 2017 | <input type="radio"/> 24 November 2017 |

Please note that the dates are subject to change. We will contact you in the event of cancellation or change. Trustee training takes place in Irish Life, Dublin unless stated otherwise.

COMPLETE THIS REGISTRATION FORM AND RETURN TO ANN MOORE

Email: ann.moore@irishlife.ie

You can make the payment by Electronic Fund Transfer (EFT). Please make sure the payment is referenced as detailed below under the Beneficiary Narrative. The date refers to the date of training.

EFT PAYMENT DETAILS

Account name	Irish Life Assurance PLC Group Business Division Receipts Account
Bank	Ulster Bank Ireland Ltd, 33 College Green, Dublin 2
Account number	05991823
Sort Code	98-50-10
BIC	ULSBIE2D
IBAN	IE22 ULSB 9850 1005 9918 23

It is of vital importance that the client includes all of the requested detail below as the beneficiary narrative. We need this to appear on our bank statements to enable us to correctly allocate the payment.

Beneficiary Narrative Trustee Training/Your Scheme Name/Your Name/Date of Trustee Training*

*Your Scheme Name refers to the Trust that you are doing the training for.

We need to receive payment in full before the course starts.



PENSIONS
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LIFE INSURANCE



Irish Life

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