

Trustee Training Programme

- ✓ Registered with the Pensions Board
- ✓ 4 hours formal CPD



Irish Life

Why are we offering this course?

With effect from 1st 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 Board may apply an on-the-spot fine of up to €2,000.

Is our trustee training course registered with the Pensions Board?

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

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

What will the course cover?

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

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

Detailed Course Content

- 1** Who can and can not 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 Board 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:

Email:

Telephone:

Job Title:

Trustee: Potential Trustee: Company Executive: Company Staff: Other:

Title of Pension Scheme:

Pension Scheme Number:

Type: Defined Benefit: Defined Contribution:

Employer Name:

Address:

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**
- 20th January 2012 (Cork - Silver Springs Hotel)
 - 25th January 2012
 - 27th January 2012
 - 24th February 2012
 - 30th March 2012
 - 27th April 2012
 - 25th May 2012
 - 29th June 2012
 - 27th July 2012
 - 28th September 2012
 - 26th October 2012
 - 30th November 2012

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, return to Sandra Murphy and either:

1. Enclose a cheque for €200 made payable to Irish Life or Irish Life Assurance plc.
Return Address: **Sandra Murphy, 4th floor, Irish Life Corporate Business,
1 Lower Abbey Street, Dublin 1.**
2. Or, instead of paying by cheque, you can also pay by Electronic Fund Transfer (EFT).
Please make sure the payment is referenced as "Trustee Training dd/mm/yyyy."
The date refers to the date of training.

EFT Payment Details

Account name: Irish Life Assurance PLC New DC Receipts Account
Ulster Bank Ire Ltd, 33 College Green, Dublin 2

Account number: 05990932

Sort Code: 98-50-10

BIC: ULSBIE2D

IBAN: IE23 ULSB 9850 1005 9909 32

Beneficiary Narrative: Trustee Training dd/mm/yyyy*

*The date refers to the date of training.

If you choose to pay by EFT, you will still need to return the registration form to Sandra Murphy as detailed on previous page.



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

Contact us

phone: 01 704 2000
fax: 01 704 1905
e-mail: code@irishlife.ie
website: www.irishlife.ie/corporatebusiness/
write to: Irish Life Corporate Business, Lower Abbey Street, Dublin 1

Irish Life Assurance plc is regulated by the Central Bank of Ireland.
In the interest of customer service we may record and monitor calls. Irish Life Assurance plc,
Registered in Ireland number 152576, Vat number 9F55923G.



Irish Life