

# ESG IN PENSION SCHEME MANAGEMENT

BANKING, FINANCIAL SERVICES AND PENSIONS PORTFOLIO



**CROWN AGENTS**  
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# ESG IN PENSION SCHEME MANAGEMENT

## COURSE OUTLINE

Environmental, Social & Governance (ESG) factors have become a critical consideration in pension scheme management. This includes the investment of pension funds as well as the governance arrangements of the scheme itself.

From an investment perspective, pension schemes must carefully consider long-term risks and the sustainability of investee entities. Against a backdrop of increasingly extreme climatic conditions, pension investors must consider the potential impairment of assets from physical hazards such as floods and wildfires, as well as climate transition risks relating to businesses and infrastructure. They must be aware of key trends and new sources of risk as global economies migrate to lower carbon business models.

From the perspective of the governance of pension schemes themselves, the fiduciary duty of Trustees to protect the long-term interests of members must be upheld, including having robust risk governance structures and processes in place. Stakeholders increasingly expect that investor firms will have strong governance structures as well as acceptable environmental and social credentials.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Identify the key environmental, social and governance factors in pension scheme management
- Appreciate the longer-term nature of the risks presented to pension scheme investments by ESG factors
- Assimilate the types of risks presented by climate change and other environmental factors
- Understand the nature of the social issues that must be managed by pension schemes

- Identify the key elements of robust governance expected of pension scheme investee entities and within pension scheme organisations themselves
- Appreciate the pivotal role of the Investment Policy Statement in setting the ESG tone for pension scheme investment portfolios

## KEY TOPICS

- Localised and global environmental risk factors
- Expectations for socially responsible investment aligned with UN SDG goals
- Governance issues relating to investee entities and within pension schemes themselves

DURATION	FEE	DATE	VENUE
05 days	£2,250	28 October - 01 November 2024	Kigali

## “ON DEMAND” COURSES



In addition to the scheduled dates shown, we are flexible to schedule additional dates to our calendar in a location of your choice. To ensure we can explore adding an additional date, do aim to contact us with your request with a minimum of 4 months' notice to allow the course to be advertised.

## WE REWARD LOYALTY

We offer all our clients a '4+1' loyalty scheme. For every four delegates enrolled from an organisation in any calendar year, we will provide you with one additional place, free of charge.

“By far one of my best training sessions. Facilitators were well organised and knowledgeable and the mid week tours really made the training fun, yet resourceful.”

FRANCIS NOBLE GAKEPTOR, Finance & Accounts Officer, GES Occupational Pensions Scheme, Ghana.  
A delegate attending Pension Management in Developing Economies.



## FEATURED TRAINER

### DUNCAN HUGHES

Duncan has over 25 years of experience in financial services across the banking, asset management and insurance sectors.

During his career in financial services he has held many senior positions at major financial firms including NM Rothschild and Columbia Threadneedle, where he was responsible for, amongst other things, green bond structuring and the development of sustainable investment products.

Duncan is a tutor for all three levels of the internationally recognised Chartered Financial Analyst (CFA) programme, as well as the CFA's international ESG programme and their Climate Change impact qualification. Working with some of the world's leading banks, he has provided consultancy services to assist with the complex transition of their asset portfolios and capital allocations to meet Net Zero emissions targets and environmental commitments.

With a speciality in ESG training, Duncan has also delivered programmes for all levels within banking organisations to build knowledge capacity to support the transition to more sustainable balance sheets and product ranges.