

# PENSION SCHEME GOVERNANCE AND REGULATION

BANKING, FINANCIAL SERVICES AND PENSIONS PORTFOLIO



**CROWN AGENTS**  
ACCELERATING SELF-SUFFICIENCY & PROSPERITY

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# PENSION SCHEME GOVERNANCE AND REGULATION

## COURSE OUTLINE

The roles of Regulators, Governors and Trustees with a fiduciary responsibility to act in the best interests of pension scheme members have evolved in recent years to become of critical importance to the future of pension provisioning.

As pension scheme assets globally fall further behind the liabilities that they are intended to fund, and yields continue to fall, the requirement for regulatory reform driven from the "bottom up" under advisement from those responsible for schemes "at the coal face" has increased.

In addition to these challenges, the requirement for a more "hands on" approach to the stewardship of scheme assets has become evident against a backdrop of disappointing investments.

This course takes delegates through the roles, risks, issues and processes involved in protecting the rights and members of all beneficiaries; the challenges of pensions' roles in improving financial inclusion; and the different regulatory models and challenges involved in protecting the interests of pension schemes.

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

- Appreciate the increasingly important societal and economic role of pensions
- Understand fiduciary responsibilities to stakeholders in scheme management
- Analyse the cash flow needs of the scheme vis-à-vis investment opportunities
- Appreciate the role of pension system regulators
- Understand recent initiatives towards more holistic and inclusive systems
- Challenge status quo systems in a reasoned and structured manner

## KEY TOPICS

- Pension scheme roles of Regulators, Trustees and other responsible parties
- The pivotal role of pensions in contemporary economies
- Poor performance of pension scheme assets and investment managers
- Building confidence in pension systems and individual schemes
- Challenging advisors and service providers to deliver greater value
- Strategic initiatives, e.g. increased scale, internal investment management
- The wider stewardship role of pension schemes in the future

DURATION	FEE	DATE	VENUE
05 days	£2,250	16 - 20 September 2024	Mauritius

## "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.

**"A very good and organised training experience. The staff and instructors are very helpful and were a pleasure to work with. I appreciated the ability to have open and frank discussions on relevant topics."**

PETER TIMOTHY SOUSA, Chief Executive Officer, Pension Commission, Bermuda.



## 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 held many senior positions at major financial firms including NM Rothschild and Columbia Threadneedle. In recent years, he has specialised in developing market financial services and pensions and has lectured and consulted widely in South-East Asia and Africa. He is the author of a number of publications in the fields of investment, financial risk management and on the opportunities presented by new financial technologies, including blockchain, particularly in a development context.