Retirement Scheme Management & Sustainability

1 – 5 March 2027
London (UK)

UK Traininig
PARTNER

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Retirement Scheme Management & Sustainability

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Introduction

The Retirement Scheme Management & Sustainability course provides a comprehensive and practical understanding of how to manage retirement and pension schemes effectively while ensuring their long-term financial sustainability.

The course covers the full lifecycle of retirement schemes, including governance frameworks, funding strategies, actuarial principles, risk management, regulatory compliance, and investment and asset allocation approaches. Participants will gain the tools and insights needed to support stable, resilient, and sustainable retirement systems in an evolving economic and demographic environment.

Course Objectives

By the end of this course, participants will be able to:

- Understand different types of retirement and pension schemes, including Defined Benefit, Defined Contribution, and Hybrid schemes
- Apply governance best practices in retirement fund management
- Analyze funding models and core actuarial principles
- Identify key financial, demographic, market, inflation, longevity, and operational risks
- Develop sustainable investment strategies and effective asset allocation frameworks
- Ensure full regulatory compliance, reporting standards, and internal controls
- Evaluate the long-term sustainability and resilience of retirement and pension schemes

Course Outlines

Day 1: Fundamentals of Retirement Schemes

- Types of retirement schemes: Defined Benefit DB, Defined Contribution DC, and Hybrid schemes
- Key stakeholders and governance structures
- Legal and regulatory environment
- Roles and responsibilities of trustees, sponsors, and administrators

Day 2: Funding & Actuarial Principles

- How retirement and pension schemes are funded
- Actuarial valuations, assumptions, and methodologies
- Contribution strategies and funding policies
- Managing funding gaps, deficits, and financial sustainability

Day 3: Investment Management for Pension Funds

- Investment objectives of retirement schemes
- Strategic and tactical asset allocation strategies
- Liability-Driven Investment LDI approaches
- Performance measurement, evaluation, and benchmarking

Day 4: Risk Management & Compliance

- Key risks: longevity risk, market risk, inflation risk, and operational risk
- Risk identification and risk mitigation strategies
- Regulatory compliance, reporting requirements, and governance standards
- Internal controls, audits, and oversight mechanisms

Day 5: Sustainability & Future Challenges

- Long-term sustainability frameworks for retirement systems
- Demographic and economic impacts on pension and retirement schemes
- ESG and responsible investment in pension funds
- Reform strategies and modernization of retirement schemes
- Practical case studies and interactive group workshops

Why Attend This Course: Wins & Losses!

- Gain a holistic understanding of retirement scheme management and sustainability
- Strengthen governance and oversight of pension and retirement funds
- Improve decision-making related to funding, investments, and risk
- Learn practical tools to enhance long-term financial stability
- Build professional confidence in managing complex retirement systems

Conclusion

Managing retirement and pension schemes requires a careful balance between financial performance, risk management, governance discipline, and long-term sustainability. This course equips professionals with the knowledge, frameworks, and practical insights needed to design, manage, and sustain resilient retirement systems in a rapidly changing environment.

By the end of the program, participants will be better prepared to evaluate retirement scheme performance, address future challenges proactively, and contribute to the development of secure, sustainable, and well-governed retirement solutions that protect beneficiaries and support institutional stability.