Comprehensive Course in Retirement Scheme Management & Sustainability

Rome (Italy)

27 July - 7 August 2026

BLACKBIRD FOR TRAINING

Comprehensive Course in Retirement Scheme Management & Sustainability

Code: FA32 From: 27 July - 7 August 2026 City: Rome (Italy) Fees: 9400 Pound

Introduction

The Retirement Scheme Management & Sustainability course is designed to provide participants with an in-depth and structured understanding of how retirement and pension schemes are managed across their full lifecycle.

The course focuses on the practical and strategic dimensions of retirement scheme management, starting from foundational concepts and governance structures, moving through funding and actuarial principles, investment management, risk and compliance, and culminating in long-term sustainability and future challenges.

Through a progressive 10-day structure, participants will develop the ability to integrate governance, funding, investment, and risk management into a coherent, sustainable framework. The course is suitable for professionals seeking to enhance their technical knowledge, strategic oversight, and decision-making capabilities in managing retirement and pension systems within complex economic and demographic environments.

Course Objectives

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

- Understand the different types of retirement and pension schemes, including defined benefit, defined contribution, and hybrid schemes
- Apply governance best practices to ensure effective oversight and accountability in retirement scheme management
- Analyze funding models and core actuarial principles that underpin long-term financial sustainability
- Identify and manage key financial, demographic, market, inflation, longevity, and operational risks
- Develop sustainable investment strategies and effective asset allocation frameworks aligned with scheme liabilities
- Ensure compliance with regulatory requirements, reporting standards, and internal control frameworks
- Evaluate the long-term sustainability, resilience, and performance of retirement and pension schemes

Course Outlines

Day 1: Fundamentals of Retirement Schemes

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

Day 2: Funding and 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-focused investment approaches.
- Performance measurement, evaluation, and benchmarking.

Day 4: Risk Management and Regulatory Compliance

- Longevity risk, market risk, inflation risk, and operational risk.
- Risk identification and mitigation strategies.
- Regulatory compliance, reporting requirements, and governance standards.
- Internal controls, audits, and oversight mechanisms.

Day 5: Sustainability and Future Challenges

- Long-term sustainability frameworks for retirement systems.
- Demographic and economic impacts on pension and retirement schemes.
- Responsible investment practices and sustainability considerations.
- Reform strategies and modernization of retirement schemes.
- Practical case studies and interactive group workshops.

Day 6: Advanced Governance and Decision-Making

- Advanced governance models for retirement and pension funds.
- Board and trustee decision-making responsibilities.
- Transparency, accountability, and ethical oversight.

Day 7: Investment Policy and Portfolio Management

- Designing and updating investment policies.
- Managing diversified multi-asset portfolios.
- Balancing risk, return, and long-term obligations.

Day 8: Financial Analysis and Performance Evaluation

- Key performance indicators for retirement schemes.
- Long-term financial sustainability analysis.
- Stress testing and scenario planning.

Day 9: Innovation and Development in Retirement Systems

- Institutional development and modernization of retirement schemes.
- Data-driven decision-making in pension management.
- Emerging trends and future retirement models.

Head Office: +44 7480 775 526
Email: Sales@blackbird-training.com
Website: www.blackbird-training.com

Day 10: Practical Application and Strategic Integration

- Integrating governance, funding, investment, and risk management.
- End-to-end review of the retirement scheme lifecycle.
- Final workshop, practical exercises, and knowledge integration.

Why Attend This Course: Wins & Losses!

- Gain a structured and comprehensive understanding of retirement scheme management from fundamentals to advanced applications
- Strengthen governance practices and oversight mechanisms across retirement and pension funds
- Improve funding and actuarial decision-making to enhance long-term financial sustainability
- Develop effective investment and asset allocation strategies aligned with scheme liabilities
- Enhance the ability to identify, assess, and manage financial, demographic, and operational risks
- Build confidence in ensuring regulatory compliance, internal controls, and performance evaluation
- Acquire practical insights to address future challenges and contribute to resilient retirement systems

Course Conclusion

Effective management of retirement and pension schemes requires more than technical knowledge; it demands an integrated approach that balances governance discipline, sound funding, prudent investment, comprehensive risk management, and long-term sustainability.

This course equips participants with the frameworks, tools, and practical understanding needed to manage retirement schemes holistically and strategically. By the end of the program, participants will be better prepared to evaluate scheme performance, respond proactively to emerging challenges, and contribute to the development of stable, sustainable, and well-governed retirement systems that safeguard beneficiaries and support long-term institutional resilience.

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