



10-Day Retirement Scheme Management & Sustainability Masterclass



AGILE LEADERS
Training Center



10-Day Retirement Scheme Management & Sustainability Masterclass

Course Overview:

This course is a practical, management-focused program designed to strengthen the capabilities of professionals responsible for overseeing and operating retirement schemes. The course concentrates on how retirement schemes are managed in practice, covering governance structures, fiduciary responsibility, compliance obligations, and ongoing sustainability challenges.

Participants will develop a clear understanding of retirement scheme management within governance frameworks and social security governance environments. The course emphasizes how fiduciary responsibility in schemes is applied in real decision-making, how pension regulatory frameworks shape operational management, and how pension compliance and oversight are maintained throughout the scheme lifecycle.

Rather than focusing on theoretical design models, the program links retirement scheme design and pension system design concepts only where they support effective management, performance monitoring. Through applied discussions and management scenarios, participants will gain the skills needed to support retirement scheme sustainability, and ensure that pension fund design continues to meet organizational and member expectations.

Target Audience:

- Retirement scheme managers and administrators
- Governance and compliance officers
- Risk management professionals
- Senior HR and finance managers responsible for retirement planning systems

Targeted Organizational Departments:

- Retirement and benefits administration
- Risk management and internal control
- Governance, policy, and compliance units
- Finance and treasury departments

Targeted Industries:

- Financial services and asset management
- Insurance and long-term savings institutions
- Large organizations managing occupational retirement schemes
- Regulatory and supervisory environments

Course Offerings:

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

- Manage retirement schemes in line with established pension governance frameworks
- Apply fiduciary responsibility principles in pension scheme management decisions
- Monitor and manage pension risk frameworks affecting scheme performance
- Ensure compliance with pension regulatory frameworks and oversight requirements
- Oversee operational, financial, and demographic risks within retirement schemes
- Support long-term pension sustainability and retirement scheme sustainability

Training Methodology:

This course uses a management-oriented learning approach combining expert-led instruction, operational case discussions, group exercises, and scenario-based analysis. Participants will examine real-life challenges related to social security governance, pension compliance and oversight, and pension risk management. Interactive sessions focus on applying governance and fiduciary responsibility concepts to day-to-day retirement scheme management, while reflection sessions reinforce learning through practical interpretation of management decisions and outcomes.

Course Toolbox:

- Retirement scheme management frameworks and models
- Governance and fiduciary responsibility checklists illustrative
- Compliance and oversight workflow examples
- Case-based management scenarios

Note: The course provides insights and examples of management tools rather than physical or licensed tools.

Course Agenda:



Day 1: Foundations of Retirement Scheme Management

- **Topic 1:** Understanding the structure and purpose of retirement schemes
- **Topic 2:** Roles and responsibilities in retirement scheme management
- **Topic 3:** Key operational components of managing retirement schemes
- **Topic 4:** Member lifecycle management and service delivery
- **Topic 5:** Administrative workflows and documentation standards
- **Topic 6:** Introduction to internal controls in scheme administration
- **Reflection & Review:** Reviewing foundational management principles

Day 2: Governance and Oversight Structures

- **Topic 1:** Governance structures for retirement scheme management
- **Topic 2:** Governing bodies, committees, and oversight mandates
- **Topic 3:** Roles of trustees, boards, and management teams
- **Topic 4:** Ethical responsibilities and conflict of interest management
- **Topic 5:** Decision-making frameworks and accountability pathways
- **Topic 6:** Evaluating governance effectiveness and maturity
- **Reflection & Review:** Strengthening governance and oversight practices

Day 3: Fiduciary Responsibility and Managerial Accountability

- **Topic 1:** Fiduciary responsibility in retirement schemes
- **Topic 2:** Applying fiduciary standards in daily operations
- **Topic 3:** Duties of loyalty, prudence, and care
- **Topic 4:** Managing third-party service providers responsibly
- **Topic 5:** Ensuring transparency in scheme operations
- **Topic 6:** Handling escalations, complaints, and sensitive cases
- **Reflection & Review:** Enhancing fiduciary culture in scheme management

Day 4: Operational Risk Management in Retirement Schemes

- **Topic 1:** Identifying operational risks in administration
- **Topic 2:** Designing risk controls and mitigation plans
- **Topic 3:** Fraud prevention and internal control mechanisms
- **Topic 4:** Business continuity and operational resilience
- **Topic 5:** Evaluating effectiveness of administrative systems
- **Topic 6:** Outsourcing risks and vendor management
- **Reflection & Review:** Applying comprehensive operational risk management



Day 5: Sustainability of Retirement Schemes

- **Topic 1:** Understanding the Importance of Sustainability in Pension Schemes
- **Topic 2:** Long-term Funding Strategies for Retirement Schemes
- **Topic 3:** Environmental, Social, and Governance ESG Factors in Retirement Scheme Management
- **Topic 4:** Pension Scheme Longevity and Resilience to Economic Shocks
- **Topic 5:** Integrating Sustainable Investment Practices into Pension Funds
- **Topic 6:** Monitoring and Reporting on Sustainability Performance
- **Reflection & Review:** Analyzing the Sustainability of Retirement Schemes

Day 6: Compliance, Regulation, and Reporting

- **Topic 1:** Compliance obligations for retirement scheme managers
- **Topic 2:** Regulatory frameworks and reporting requirements
- **Topic 3:** Internal audits and monitoring mechanisms
- **Topic 4:** Ensuring accuracy in member and financial records
- **Topic 5:** Managing regulatory change and policy updates
- **Topic 6:** Documentation and evidence management
- **Reflection & Review:** Supporting a strong compliance environment

Day 7: Member Services, Communication, and Stakeholder Relations

- **Topic 1:** Managing member communication and expectations
- **Topic 2:** Handling claims, retirements, and member inquiries
- **Topic 3:** Improving service quality through process management
- **Topic 4:** Stakeholder engagement and information flow
- **Topic 5:** Supporting members in understanding their benefits
- **Topic 6:** Communication strategies for complex scheme rules
- **Reflection & Review:** Enhancing member service delivery

Day 8: Performance Monitoring, Metrics, and Continuous Improvement

- **Topic 1:** Key performance indicators for retirement scheme management
- **Topic 2:** Monitoring administrative efficiency and accuracy
- **Topic 3:** Evaluating financial performance and sustainability markers
- **Topic 4:** Benchmarking scheme performance against standards
- **Topic 5:** Using dashboards and reporting tools for monitoring
- **Topic 6:** Implementing continuous improvement programs
- **Reflection & Review:** Developing a performance-oriented management culture



Day 9: Strategic Management of Retirement Schemes

- **Topic 1:** Strategic planning for long-term scheme sustainability
- **Topic 2:** Integrating governance, risk, and compliance into strategy
- **Topic 3:** Preparing schemes for demographic and economic shifts
- **Topic 4:** Managing reforms and organizational change
- **Topic 5:** Strengthening the alignment between scheme objectives and operations
- **Topic 6:** Scenario planning and future-readiness strategies
- **Reflection & Review:** Building strategic capability in scheme management

Day 10: Future-Proofing Retirement Scheme Operations

- **Topic 1:** Modernizing retirement scheme operations
- **Topic 2:** Trends shaping the future of retirement scheme management
- **Topic 3:** Managing innovation in processes and technology
- **Topic 4:** Enhancing resilience against long-term sustainability pressures
- **Topic 5:** Strengthening accountability and transparency in administration
- **Topic 6:** Preparing management teams for emerging challenges
- **Reflection & Review:** Final review, lessons learned, and action planning

FAQ:

What specific qualifications or prerequisites are needed for participants before enrolling in the course?

Participants should have professional experience in HR, finance, governance, compliance, or pension administration. No actuarial background is required.

What aspects of retirement schemes does this course focus on most?

The course focuses on management, governance, risk control, compliance, and sustainability rather than technical scheme design.

How This Course is Different from Other Retirement Scheme Courses:

This program is specifically focused on managing retirement schemes rather than designing them. It emphasizes governance execution, fiduciary responsibility, pension compliance and oversight, and long-term pension sustainability. Participants gain practical insight into how retirement schemes are operated, monitored, and sustained in real organizational environments, enabling confident and informed management decision-making.



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