

Pension Fund Laws and Plans Seminar Outline

► Overview:

A pension Plan is a plan in which employer promises a specified monthly benefit on retirement that is predetermined by a formula based on the employee's earnings history, tenure or service, and age, rather depending on investment returns.

► Objectives:

This seminar will be of benefit to all those wishing to gain the skills to advise and assist clients on pension matters. It takes professionals through the first principles of pensions, from how pensions schemes work, current trends and developments to the government's new answer to making pensions pay. It will guide delegates through current practices and procedures, and relevant legislation will also be examined. It covers topics which include: what is a pension scheme, examining the different types of occupational and personal pension schemes; contrasting money purchase and final salary arrangements etc.

We help by training participants so they can gain knowledge, confidence and the requisite skills to run their pension arrangements. We provide general and bespoke training for employers on issues such as:

- Scheme funding
- Making changes to a scheme
- Resolving disputes
- Managing conflicts of interest
- The pensions aspects of corporate transactions (including clearance and anti-avoidance)
- The role of the Pensions Regulator
- Equal treatment and discrimination
- Employer Debts
- Winding-up a scheme

► Possible Attendance:

Attendants may include:

- Project managers
- Human resource managers
- Company Directors
- Members of an employer's HR team
- Payroll Department Staff
- Finance Personnel
- Lawyers with small amount of experience of pension laws
- Trustees
- Actuaries
- Pension Scheme Advisers

► Structure:

12 hours to be carried out over 2 days including presentation, workshop, valuable supporting documents for Pension Laws

► Contents:

This seminar is designed to provide delegates with an update on the key current and future issues affecting occupational pension provision. It also gives delegates an opportunity to hear the views of leading industry figures and to find out what other schemes are doing.

It covers:

- Understanding the basics
- Legislation
- The Pensions Act
- The professionals
- Designing a pension package
- Pension simplification
- Payroll and taxation
- Communication
- Changing/inheriting pension problems.

Throughout the seminar there will be opportunities for questions, and where appropriate, case studies will be discussed.