

# Certificate of Advanced Retirement Fund Trusteeship

Advanced Certificate is tailored for Consultants, Principal Officers, Chairpersons and Trustees who have passed the Certificate of Proficiency and want to upgrade their skills.

## Certificate of Advanced Retirement Fund Trusteeship

### Course Content

- ✓ 1. Fund Investment Objectives
- ✓ 2. Investment Policy Statement
- ✓ 3. Monitoring performance
- ✓ 4. Risk Management Policy
- ✓ 5. Expense Management Policy.
- ✓ 6. Code of Conduct
- ✓ 7. Managing Conflict of interest.

### Course Objectives

After successful completion of this course, delegates will have an in-depth knowledge of Retirement funds. This program is a must for Chairpersons and Principal Officers. The program focuses much on Fund Governance and Investments. The course is presented in workshop style using case studies. Delegates are encouraged to apply the knowledge to their own funds.

### Entry requirements

Delegates must have attained the Certificate of Proficiency in Retirement Fund Trusteeship.

### Duration

Three days comprising of interactive lectures for two days and a workshop on the third day that will include an assessment. A formal examination will be written 8 weeks after the training.

### Costs are as follows

Certificate of proficiency - E5400

### Registration

To book your seat, email or call us for training dates that suit your diary.

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