

Certificate of Proficiency in Retirement Fund Trusteeship

The training program is designed to meet the requirements set by the FRSA for Principal Officers, Trustees, Administrators, Brokers and HR personnel

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Course Content

- 1. Introduction to Retirement Funds
- 2. Retirement Fund Trusteeship
- 3. Retirement Fund Investments
- 4. Payment of Fund Benefits (Distribution of death benefits, options at retirement, taxation)
- 5. Fund Reports and record keeping .
- 6. Fund Governance
- 7. Role Players in Managing Retirement Fund

Course Objectives

After successful completion, delegates should have a sufficient working knowledge of Retirement Funds and an understanding of the Legal, Administrative, Investment and Governance structures they operate in.

Entry requirements

Ability to read and write.

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 - E4500

Registration

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

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