

Retirement Schemes & Pension Sustainability Masterclass

18 – 22 October 2027
Madrid

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Ref: 103600497_71256 **Date:** 18 – 22 October 2027 **Location:** Madrid **Fees:** 5700 Euro

Course Overview:

The Retirement Scheme Management and Pension Sustainability Masterclass 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 pension governance frameworks and social security governance environments. The course emphasizes how fiduciary responsibility in pension 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, and long-term pension sustainability. Through applied discussions and management scenarios, participants will gain the skills needed to manage pension risk frameworks, support retirement scheme sustainability, and ensure that pension fund design continues to meet organizational and member expectations.

Target Audience:

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

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Targeted Organizational Departments:

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

These departments are directly involved in managing pension schemes, applying pension governance frameworks, ensuring fiduciary responsibility, and maintaining pension compliance and oversight across the organization.

Targeted Industries:

- Pension and retirement services
- 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

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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
- Pension risk monitoring examples
- 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: Retirement Scheme Management Foundations

- **Topic 1:** Roles and responsibilities in retirement scheme management
- **Topic 2:** Structure and operational components of retirement schemes
- **Topic 3:** Managing contributions, benefits, and member records
- **Topic 4:** Day-to-day administration of pension and retirement schemes
- **Topic 5:** Coordination between HR, finance, and scheme administrators
- **Topic 6:** Linking scheme rules to effective operational management
- **Reflection & Review:** Reviewing core management responsibilities and operational challenges

Day 2: Governance, Fiduciary Responsibility, and Oversight

- **Topic 1:** Governance structures in retirement and pension schemes
- **Topic 2:** Fiduciary responsibility and accountability of scheme managers
- **Topic 3:** Board roles, committees, and decision-making processes
- **Topic 4:** Managing conflicts of interest and ethical obligations
- **Topic 5:** Oversight mechanisms and reporting lines
- **Topic 6:** Governance failures and lessons learned from practice
- **Reflection & Review:** Strengthening governance effectiveness in scheme management

Day 3: Risk Management and Operational Control

- **Topic 1:** Identifying financial and demographic risks in retirement schemes
- **Topic 2:** Managing longevity, funding, and sustainability risks
- **Topic 3:** Operational and administrative risk control measures
- **Topic 4:** Monitoring scheme performance and key risk indicators
- **Topic 5:** Managing service provider and outsourcing risks
- **Topic 6:** Handling unexpected shocks and stress situations
- **Reflection & Review:** Applying risk-aware decision-making in scheme management

Day 4: Compliance, Regulation, and Performance Monitoring

- **Topic 1:** Regulatory obligations affecting retirement scheme management
- **Topic 2:** Compliance responsibilities of scheme managers
- **Topic 3:** Internal controls, audits, and documentation practices
- **Topic 4:** Monitoring performance and management reporting
- **Topic 5:** Managing regulatory change and reform impact
- **Topic 6:** Ensuring transparency and accountability in scheme operations
- **Reflection & Review:** Aligning compliance and performance oversight

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Day 5: Strategic Management and Long-Term Sustainability

- **Topic 1:** Strategic oversight of retirement scheme sustainability
- **Topic 2:** Managing long-term financial and demographic pressures
- **Topic 3:** Integrating governance, risk, and compliance into strategy
- **Topic 4:** Improving efficiency and effectiveness of scheme operations
- **Topic 5:** Continuous improvement in retirement scheme management
- **Topic 6:** Building resilient and adaptable retirement schemes
- **Reflection & Review:** Developing a management roadmap for sustainable retirement schemes

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.

How long is each day's session, and is there a total number of hours required for the entire course?

Each day's session lasts approximately 4–5 hours. The full course duration is around 20–25 hours over one week.

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.