# 10-Day Retirement Scheme Management & Sustainability Masterclass

27 December 2026 – 7 January 2027
Langkawi

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## Overview

Operating a modern pension fund demands rigorous administrative structures, transparent reporting pathways, and resilient long-term financial modeling. This masterclass equips professionals with essential capabilities in retirement scheme management and sustainability, balancing day-to-day administrative execution with overarching strategic stewardship. Participants analyze how statutory oversight, supervisory expectations, and fiduciary duties influence operational decisions across the retirement fund lifecycle. The curriculum emphasizes actionable control environments, stakeholder accountability, and prudent asset-liability monitoring without relying on abstract theoretical formulas. This course is delivered by Agile Leaders Training Center.

## Who Should Attend

- Retirement scheme managers, operational directors, and principal officers overseeing scheme execution.
- Pension fund administrators and operations specialists managing contribution workflows and benefit processing.
- Governance officers, corporate secretaries, and compliance analysts tracking supervisory standards.
- Risk management personnel and internal auditors assessing control vulnerabilities within fund operations.
- Human resources executives, finance directors, and treasury leaders managing occupational pension arrangements.

## Departments and Industries

This program supports administrative teams and governance professionals responsible for retirement savings mechanisms across multiple economic sectors.

- Retirement Scheme Administration and Benefits Processing Units
- Risk Management, Internal Audit, and Internal Control Divisions
- Governance, Legal Policy, and Regulatory Compliance Offices
- Corporate Finance, Payroll, and Treasury Departments
- Financial Services, Life Insurance, and Institutional Asset Management Institutions

## Learning Objectives

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

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- Manage retirement schemes in full alignment with established pension governance frameworks and supervisory mandates.
- Implement sound principles of fiduciary responsibility in schemes during operational and strategic decision-making.
- Identify and mitigate vulnerabilities using operational risk management in retirement schemes.
- Monitor compliance across pension regulatory frameworks and internal audit reporting lines.
- Integrate environmental, social, and economic indicators to reinforce long-term scheme funding resilience.
- Establish clear service benchmarks, performance dashboards, and transparent member communication strategies.

## Course Agenda

## Day 1: Foundations of Scheme Administration

- Structure, objective, and institutional purpose of retirement schemes
- Core managerial responsibilities across the pension operational lifecycle
- Execution of contribution collection, allocation, and member record maintenance
- Workflow structuring for member intake, benefit calculation, and exit handling
- Documentation integrity, data privacy requirements, and record management
- Internal control baselines for administrative and transactional accuracy

## Day 2: Governance Structures and Board Mandates

- Governance architecture in modern retirement and social security governance
- Mandates, committee charters, and division of authority across governing boards
- Accountabilities among trustees, advisory committees, and executive directors
- Conflict of interest policies, ethics protocols, and code of conduct enforcement
- Decision-making frameworks, escalation ladders, and delegation instruments
- Assessing organizational governance maturity and board performance effectiveness

## Day 3: Fiduciary Standards and Managerial Accountability

- Fiduciary responsibility in schemes and statutory duties of loyalty and prudence
- Translating fiduciary obligations into practical day-to-day scheme administration
- Managing third-party administrators, custodians, and external asset managers
- Establishing contractual service level agreements and performance audit triggers
- Maintaining administrative transparency and managing formal member grievances
- Case review of fiduciary breaches and institutional remedies

## Day 4: Operational Risk and Internal Control

- Identifying administrative, transaction processing, and system vulnerabilities
- Designing preventative and detective internal controls across processing pipelines
- Fraud mitigation strategies, dual authorizations, and segregation of duties
- Business continuity planning, disaster recovery, and data security resilience
- Evaluating system scalability, technology failure points, and data reconciliation
- Vendor risk assessment and oversight of critical outsourced services

## Day 5: Scheme Sustainability and Responsible Stewardship

- Drivers of financial longevity and funding health in retirement systems
- Asset-liability management principles and long-term funding strategies
- Incorporating Environmental, Social, and Governance criteria into investment review
- Stress testing scheme resilience against inflation shocks and demographic aging
- Monitoring responsible stewardship and sustainable investment allocations
- Reporting sustainability metrics to governing bodies and regulatory authorities

## Day 6: Regulatory Compliance and Reporting Protocols

- Mapping compliance requirements under applicable pension regulatory frameworks
- Supervisory filings, statutory disclosure rules, and financial statements
- Structuring regular internal compliance monitoring and testing programs
- Ensuring accuracy across audited member accounts and financial statements
- Tracking legislative amendments, policy revisions, and statutory transitions
- Managing document archives, regulatory inspections, and evidentiary trails

## Day 7: Member Services and Stakeholder Communication

- Designing transparent benefit statements, retirement estimates, and portal access
- Managing member lifecycle transitions, retirement claims, and disability cases
- Establishing service quality metrics across call centers and administrative desks
- Stakeholder engagement plans for employer sponsors, unions, and active members
- Financial education programs that help participants understand plan rules
- Communicating complex benefit formulas, deductions, and structural changes

## Day 8: Performance Monitoring and Operational Efficiency

- Establishing key operational metrics for administrative timeliness and accuracy
- Evaluating cost-per-member ratios and transactional overhead expenses
- Monitoring asset administration, fee transparency, and investment execution
- Benchmarking internal administrative efficiency against industry standards
- Developing executive management dashboards and key risk indicators
- Deploying continuous process improvements and quality management systems

## Day 9: Strategic Management and Demographic Adaptation

• Formulating long-range strategic roadmaps for institutional retirement plans
• Harmonizing risk frameworks, compliance policies, and organizational strategy
• Analyzing demographic trends, life expectancy shifts, and workforce transitions
• Managing plan design modernization, structural mergers, and scheme closures
• Aligning operational capabilities with strategic institutional objectives
• Scenario modeling and stress analysis for economic downturns

## Day 10: Future-Proofing Scheme Operations

• Adopting digital administration platforms, automation, and self-service tools
• Emerging operational shifts in modern retirement scheme administration
• Managing change during technological transitions and systems migration
• Strengthening institutional resilience against long-term demographic pressures
• Fostering accountability, ethical culture, and operational transparency
• Consolidation of course takeaways and operational action planning

## Practical Exercises

Participants engage in structured management activities to address operational hurdles and design effective controls.

• Draft an operational risk register mapping key failure points across benefit disbursements.
• Design a board-level oversight dashboard tracking compliance markers and turnaround times.
• Develop a vendor evaluation matrix for monitoring outsourced administration services.
• Formulate a communication response framework for complex changes to scheme rules.

## FAQs

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

Participants should have professional experience in human resources, 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 does this masterclass address operational risk?

The program covers internal control design, fraud prevention, vendor risk management, and administrative audit trails to secure scheme processing integrity.

## Conclusion

This masterclass equips scheme administrators, trustees, and operational managers with the capabilities needed to maintain fund integrity and supervisory compliance. By instituting transparent governance models, proactive risk oversight, and sustainable administrative workflows, participants ensure their retirement funds remain resilient, accountable, and member-focused over the long term.