# Pension Fund Investment and Scheme Governance Training Course

19 – 23 April 2027
Montreux

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**Ref:** 1236_191325 **Date:** 19 – 23 April 2027 **Location:** Montreux **Fees:** 7500 Euro

## Overview

Pension Fund Investment and Scheme Governance Training Course is a one-week advanced course for pension governing bodies, executives, investment committees, risk, compliance, actuarial, finance, and asset-owner teams that leaves participants with a Pension Governance and Investment Toolkit. Participants connect fiduciary purpose, delegated authority, investment policy, liabilities, asset allocation, manager oversight, liquidity, risk, costs, performance, regulation, and member outcomes. The course turns board information into traceable decisions without giving investment advice. Agile Leaders Training Center presents pension fund investment and scheme governance as one accountable oversight system.

## Who Should Attend

- Governing-body functions responsible for member interests, accountability, delegations, and reserved decisions
- Investment-committee functions responsible for objectives, policy, allocation, managers, risk, and performance
- Executive functions responsible for scheme operations, service providers, reporting, and decision implementation
- Risk and compliance functions responsible for controls, conflicts, regulatory mapping, and assurance
- Actuarial and finance functions responsible for funding, liabilities, liquidity, projections, and financial information
- Asset-owner functions responsible for mandates, stewardship, cost oversight, and investment operations

The course assumes participants contribute to pension governance, funding, investment, or oversight decisions and leaves out personal financial advice, security selection, actuarial qualification, and jurisdiction-specific legal advice.

## Departments and Industries

The course supports pension governance and investment oversight across:

- Trustee, governing-board, investment, risk, compliance, actuarial, finance, and internal-audit functions
- Occupational, personal, public-service, and employer-sponsored pension arrangements
- Asset-owner, investment-management, custody, administration, and advisory organizations
- Corporate groups, financial institutions, public entities, and nonprofit organizations
- Defined-benefit, defined-contribution, and hybrid pension structures where applicable

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## Learning Objectives

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

- Apply governing-body duties and decision authorities
- Build a pension investment policy and beliefs framework
- Analyze liabilities, liquidity, risk, and asset-allocation constraints
- Evaluate external managers and service providers
- Use performance, cost, risk, and member-outcome dashboards
- Prioritize regulatory gaps, conflicts, and board actions

## Course Agenda

### Day 1: Pension Governance Architecture

- Member-Interest and Fiduciary-Purpose Statement
- Governing-Body Accountability and Reserved-Matter Map
- Oversight, Executive, and Service-Provider Responsibility Matrix
- Board Competence, Conflict, and Conduct Register
- Pension Regulation Applicability and Evidence Map

### Day 2: Investment Policy and Asset Allocation

- Investment Beliefs and Retirement-Income Objective Framework
- Liability Profile and Investment-Horizon Assessment
- Risk-Return, Liquidity, and Constraint Register
- Strategic Asset Allocation Decision Framework
- Diversification, Concentration, and Rebalancing Policy

### Day 3: Mandates and Manager Oversight

- Investment Mandate and Benchmark Design Checklist
- Manager Selection and Due-Diligence Scorecard
- Performance, Risk, Cost, and Attribution Dashboard
- Responsible Investment and Stewardship Oversight Matrix
- Custodian, Administrator, and Adviser Control Review

### Day 4: Risk, Regulation and Member Outcomes

- Pension Risk Budget and Appetite Statement
- Funding, Actuarial, and Asset-Liability Information Pack
- Operational, Investment, Governance, and Outsourcing Risk Register
- Regulatory Reporting and Supervisory-Readiness Checklist
- Member Outcome, Disclosure, and Communication Dashboard

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## Day 5: Pension Governance Practice

- Suggested Exercise: Map Duties, Delegations, and Conflicts
- Suggested Exercise: Test Investment Objectives and Constraints
- Suggested Exercise: Review Allocation and Manager Evidence
- Suggested Exercise: Diagnose Risk and Member-Outcome Gaps
- Capstone Exercise: Pension Governance and Investment Toolkit

## Practical Exercises

The course uses suggested activities to practice pension-governance decisions:

- Suggested activity: map governing-body duties, reserved matters, delegations, conflicts, and evidence of oversight
- Suggested activity: translate liabilities, funding, liquidity, investment horizon, and member objectives into policy constraints
- Suggested activity: compare asset-allocation choices, manager mandates, performance, costs, risks, stewardship, and service-provider controls
- Suggested activity: assemble a board pack connecting regulatory gaps, member outcomes, risk actions, and decision records

## FAQs

### Who does pension fund investment and scheme governance training suit, and what does it assume?

Pension fund investment and scheme governance training suits governing-body, executive, investment, risk, compliance, actuarial, finance, and asset-owner professionals and assumes involvement in pension oversight or decision support.

### How does pension governance training differ from personal retirement-investment training?

Pension governance training addresses institutional duties, scheme structures, policies, delegations, asset oversight, controls, and member outcomes, while personal retirement-investment training addresses individual saving and product choices.

### How should pension liabilities influence investment governance?

Pension liabilities should inform investment horizon, liquidity, risk tolerance, return objectives, asset-liability analysis, stress testing, and the governing body's assessment of whether strategy supports expected benefit obligations.

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## What should a pension investment policy contain?

A pension investment policy should connect purpose, objectives, beliefs, liabilities, risk appetite, liquidity, strategic allocation, diversification, rebalancing, permitted activities, delegations, mandates, performance measures, costs, stewardship, monitoring, and review.

## How should a pension governing body oversee external managers?

A pension governing body should define mandates, selection criteria, authority, reporting, performance and risk measures, cost expectations, stewardship duties, conflicts, escalation, review triggers, and termination arrangements while retaining ultimate accountability.

## Conclusion

Participants take back a Pension Governance and Investment Toolkit containing the duty map, delegation matrix, regulatory register, investment-policy framework, allocation record, manager scorecard, risk register, dashboard, and board decision log. The toolkit makes assumptions, evidence, ownership, and member impact traceable. It helps governing bodies oversee pension assets and scheme operations through a documented decision process.