Pension Governance and Regulatory Oversight Training Course

6 – 10 September 2027
Lisbon

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Ref: 1252_192541 **Date:** 6 – 10 September 2027 **Location:** Lisbon **Fees:** 5700 Euro

Overview

Pension Governance and Regulatory Oversight Training Course is a one-week advanced course for pension trustees, governance, risk, compliance, legal, finance, actuarial, benefits, and audit professionals who need a Pension Governance and Regulatory Assurance Pack. The course connects fiduciary accountability, risk-based governance, internal controls, funding and investment oversight, member administration, conflicts, disclosures, regulatory change, and assurance evidence. Participants trace decisions from governing-body mandate to corrective action. Agile Leaders Training Center presents pension governance through documented authority, challenge, evidence, and review.

Who Should Attend

- Teams responsible for pension governing-body accountability and delegated authority
- Teams responsible for funding, investment, actuarial, and financial oversight
- Teams responsible for pension administration, records, benefits, and member communications
- Teams responsible for regulatory compliance, legal interpretation, and change governance
- Teams responsible for risk, internal control, audit, and assurance reporting
- Teams responsible for service-provider selection, monitoring, and escalation

The course assumes participants oversee pension decisions, controls, administration, risk, or assurance and leaves out jurisdiction-specific legal advice and actuarial calculations.

Departments and Industries

The course supports functions and sectors that govern retirement arrangements, member entitlements, funding, investment, and administration.

- Pension governance, benefits, finance, risk, compliance, legal, and internal-audit departments
- Trustee offices, actuarial teams, investment committees, and assurance functions
- Financial services, insurance, asset management, and professional-services organizations
- Energy, manufacturing, construction, logistics, and transport employers
- Public services, healthcare, education, charities, and member-based organizations

Learning Objectives

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

- Analyze pension governance mandates, accountability, and delegations
- Build risk registers and documented internal controls
- Evaluate funding, investment, and service-provider oversight
- Apply conflict, disclosure, and member-administration controls
- Use regulatory-change and breach-escalation methods
- Prioritize assurance findings and corrective actions

Course Agenda

Day 1: Governance Mandate and Accountability

- OECD Pension Governance Responsibility Map
- Governing-Body Mandate and Reserved-Matters Schedule
- Fiduciary Decision and Member-Interest Test
- Delegated Authority and Oversight Matrix
- Governance Calendar and Decision-Evidence Register

Day 2: Risk and Internal Controls

- Pension Risk Universe and Risk Register Method
- Risk Appetite, Indicator, and Escalation Framework
- Internal Control Design and Documentation Sheet
- Conflict-of-Interest Declaration and Management Protocol
- Service-Provider Due-Diligence and Monitoring Scorecard

Day 3: Funding and Investment Oversight

- Funding Position and Assumption Challenge Checklist
- Investment Governance and Strategic Allocation Review
- Asset-Liability Risk and Scenario Discussion Method
- Investment Performance, Cost, and Mandate Dashboard
- Funding and Investment Decision Record

Day 4: Administration and Regulatory Assurance

- Member Data and Benefit Administration Control Map
- Disclosure, Communication, and Complaint Review Checklist
- Regulatory Obligation and Change Impact Register
- Breach Assessment and Escalation Decision Tree
- Governance Assurance and Corrective-Action Report

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Day 5: Pension Governance Practice

- Exercise: Accountability and Delegation Gap Diagnosis
- Exercise: Risk Register and Control Evaluation
- Exercise: Funding and Investment Challenge Meeting
- Exercise: Regulatory Change and Breach Decision
- Capstone Exercise: Pension Governance and Regulatory Assurance Pack

Practical Exercises

The course uses suggested activities that turn pension decisions, risks, controls, and evidence into governance action.

- Suggested activity: map governing-body, committee, adviser, administrator, and service-provider accountabilities.
- Suggested activity: evaluate funding, investment, administration, conflict, and communication risks and controls.
- Suggested activity: assess a regulatory change, record its impacts, and assign actions and evidence.
- Suggested activity: challenge an assurance report and prioritize corrective actions for governing-body review.

FAQs

Who should attend the Pension Governance and Regulatory Oversight Training Course?

The course suits professionals responsible for pension governance, funding, investment, administration, regulation, risk, controls, or assurance. It assumes practical involvement in pension decisions or oversight.

How does pension governance differ from general pension administration training?

Pension governance focuses on accountability, fiduciary decisions, risk, controls, funding and investment challenge, regulatory change, and assurance, while pension administration training focuses on processing member records, contributions, and benefits.

What should a pension governance risk register contain?

A pension governance risk register records the risk, cause, impact, owner, controls, indicators, tolerance, actions, evidence, review date, and escalation route.

How can governing bodies evidence pension regulatory oversight?

Governing bodies evidence pension regulatory oversight through mandates, minutes, decision records, obligation registers, control tests, provider reports, breach assessments, action tracking, and assurance conclusions.

Conclusion

The course links pension accountability, risk, controls, funding, investment, administration, regulatory change, and assurance. Participants take back a Pension Governance and Regulatory Assurance Pack containing mandates, registers, review tools, decisions, and action records. The pack makes governance challenge, evidence, escalation, and corrective-action ownership easier to demonstrate and review.