



## **Pension Governance and Regulatory Oversight Training Course**

7 – 11 June 2027  
Addis Ababa

## Pension Governance and Regulatory Oversight Training Course

**Ref:** 1252\_224415 **Date:** 7 – 11 June 2027 **Location:** Addis Ababa **Fees:** 4500 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



## **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.