

PENSION TRUSTEE WORKSHOPS

JLT EMPLOYEE BENEFITS 2018

Staying on top of the constantly shifting Pensions landscape is vital to today's Pension Trustee.

Changes to the Annual and Lifetime Allowance, a new State pension and the ever growing and evolving Defined Contribution and Defined Benefit world are just some of the challenges for employers, trustees and governance committees for group personal pensions.

When combined with new investment strategies, developments in de-risking exercises, multi-channel communication programmes and integrated risk management reviews, the pensions world has never been more complex.

It is understandable that today's Pension Trustee can feel overwhelmed. The Pensions Regulator doesn't want this to be the case and, of course, neither do you!

JLT IS ON HAND TO HELP

At JLT, we have developed a targeted training and education programme that is designed to meet the ongoing needs and requirements of all involved in the provision of workplace pensions to ensure the right outcomes for scheme members.

JLT has long been a proponent of the Pensions Regulator's aspirations and we have continued to shape our training courses by reference to client demands and market influences. As recognition of the quality of our training programme, JLT is a past winner of Engaged Investor's award for Best Trustee Education Provider.

Whether you are just embarking on your journey as a Trustee or have years of experience but still recognise the importance of continued development, we have the course for you.

1. FOUNDATION COURSE (for new trustees)

DATE/LOCATION:

29 March
JLT London Office

28 June
JLT London Office

23 November
JLT Manchester Office

TIME

09.30 to 16.00
(lunch and refreshments included)

COST

Only £450 + VAT including lunch and copies of your course materials.

Our Pension Development programme covers the basics of:

- Trusteeship;
- Investment;
- Governance;
- Funding principles; and
- Pension scheme risk management.

The course is designed to be interactive and will be structured so that you can select the "need only" sessions that are relevant to your role and the type of scheme you look after.

- Company pensions and state pensions
- Legal background to the trustee / governance committee member role
- Trustees' duties, responsibilities and powers
- Pensions and tax legislation
- Financing and investment fundamentals
- Managing and administering the scheme
- Communication and disclosure
- Current topical issues

2. SPECIALIST TRAINING (for experienced Trustees, Pension Scheme Managers)

In addition, we will be running one-off special sessions covering matters of topical interest – dates and further details to be announced.

HOW TO BOOK

Please complete the booking form attached to this flyer and return it to the address shown. Alternatively, to register an interest online please visit <http://www.jltemployeebenefits.com/DevelopingTrustee> or contact Julie Anstiss at julie_anstiss@jltgroup.com.

We can also arrange bespoke training sessions covering particular ongoing training needs. We offer these courses either at our own venues or on-site at client offices possibly adjoining previously arranged trustee/governance committee meetings.

To obtain a quote for bespoke training, please get in touch with your usual JLT contact or, if you are not currently a client of JLT, please contact Jayne Pocock to discuss your requirements. We will then provide a competitive fixed fee based on your exact needs.

JLT Employee Benefits are:

- Quoted on the London Stock Exchange
- The largest European-headquartered provider in our sector
- A major provider of Employee Benefit Solutions
- A major provider of employee healthcare & protection
- A leader in the field of benefit communications
- Preferred provider for actuarial consulting by a large number of UK schemes
- One of the few consultancies to offer a single source for centralised pensions and flexible packages

Our Extensive Range of Employee Benefit Solutions Includes:

- Actuarial Consulting
- Administration Consulting
- Corporate Consulting
- Defined Contribution Services
- Flexible Benefits
- Health and Risk Consulting
- Independent Trustee Services
- Investment Consulting
- Pension Scheme Administration
- Pension Scheme Consulting
- Risk Benefits Brokerage and Consulting
- Services for Financial Intermediaries and Institutions
- Scheme Wind Up and Restructure
- Trustee Governance
- Trustee Services
- Training
- Wealth Management

We also provide a range of Insurance services within the Group, including:

- Co-ordinating insurance covers with risk management policy
- Risk and Health & Safety Management services

- Regular reviews and audits of your policy covers in line with your business
- Development of competitive financing options to identify risk transfer options
- Providing summary of policy covers and reports for management team
- Dedicated staff on call when you need them

Our one-stop-shop proposition helps companies reduce risk whilst providing better control of their benefits spend. If you are already a JLT client and require further information about any of our services, then please get in touch with your existing consultant.

If you haven't yet worked with us and would like to talk to someone about how JLT can help you, then please get in touch with:

Jayne Pocock

- 020 3465 4956
- jayne_pocock@jltgroup.com

Pension Development Workshops 2018

To book places on The Developing Trustee workshop simply complete the form below and return to:

Pension Governance Services

JLT Employee Benefits
The St Botolph Building
138 Houndsditch
London EC3A 7AW

Contact name: _____

Company address: _____

Postcode: _____

Tel: _____

Email: _____

Alternatively, to register an interest online please visit <http://www.jltemployeebenefits.com/DevelopingTrustee>. If you have any queries please contact:

Julie Anstiss

- 020 7895 7800
- julie_anstiss@jltgroup.com

The cost is £450 + VAT per person.
The course fee is payable in advance and you will be invoiced to the address provided on your booking form.

Signature

Date

Please provide attendee details:

MARKETING

The information provided on this form along with any other related data will be held by JLT Benefit Solutions Ltd a member of Jardine Lloyd Thompson Group plc and/or its agents. The details which you provide may be used to update our records and those of companies associated with Jardine Lloyd Thompson Group plc so that we may provide you from time to time with employee benefits related information or details of events, services or products, which we think, may be of interest to you.

ABOUT JLT EMPLOYEE BENEFITS

Jardine Lloyd Thompson (JLT) is a leading provider of risk management, insurance broking and employee benefits services. We have a breadth of services and a geographical reach that make JLT a compelling proposition for all companies and pension schemes in the UK today.

CONTACTS

Jayne Pocock

JLT Employee Benefits

- 020 3465 4956
- jayne_pocock@jltgroup.com

JLT Employee Benefits

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JLT TRUSTEE TRAINING PROGRAMME QUESTIONS FOR THE BOOKING FORM

- Are you a Trustee? Yes No
- If yes, when were you appointed?
- How many years/months of experience as a trustee for:
 - this appointment?
 - previous appointments?
- What type of pension scheme does your company have in place?
Tick all that apply.
 - Open DC
 - Open DB
 - Closed DC
 - Closed DB
 - Group Personal Pension Plan
 - Other
- Are there specific areas you wish to focus on at the seminar?
 - Investments – asset classes, strategies etc
 - Member communications
 - Governance structures
 - Actuarial Valuations and key assumptions
 - Administration
 - Legal and Pensions Law
 - Taxation
 - General overview
 - Other
- Do you have specific questions/topics that you would like us to address on the day?