

# Trustee training: tailored solutions to meet your needs



## Introduction

**We specialise in providing scheme-specific training to meet your particular needs.**

We see our role as supporting you to develop the skills to become an increasingly aware and effective trustee. Suitable for new trustees and experienced trustees alike, our training courses are designed to focus the mind on the important issues at hand, so you are constantly developing your capabilities and keeping your knowledge up to date.

We believe there are three principles that will assist you on your journey as a trustee. These will help you focus on the main requirements and allow the detail to fall into place:

1. To act as an honest and prudent man would in his own affairs.
2. To consider the interests of all members.
3. If you are not sure, ask. If you are still not sure, demand!

## Understanding your responsibilities

One of the main impacts of the Pensions Act 2004 was that all trustees, within six months of appointment, now have an explicit duty to demonstrate that they have a knowledge and understanding of:

- the law relating to trusts and pensions
- the principles of funding and investment, and
- the documents of their particular scheme.

The Pensions Regulator has developed a free e-learning training syllabus ([www.trusteetoolkit.co.uk](http://www.trusteetoolkit.co.uk)) to help meet the requirements for trustee knowledge and understanding (TKU).

We build on this base to give you the perspective of experienced professionals and their view as to how this affects you in the real world, by creating modular-style training which relates specifically to your pension scheme. We place great emphasis on providing trustees with clear information on 'why', 'how' and 'so what' so you can really get to grips with the nuts and bolts of pensions.

## Why choose us?

For over ten years, we have been helping individuals to become successful trustees. During this time, we have worked with numerous people from all walks of life, industry sectors and job roles, many of whom started with no prior experience of finance or pensions.

We are fully aware of the volume and complexity of the TKU that you have to get through in such an aggressive timescale. Fortunately, our trustee training will guide you through this in a user-friendly way, so you will get up to speed fast.

Our training will also take into consideration the rapid pace of change within the current pensions arena, therefore enabling you to keep abreast of the altering regulation and how it impacts on your scheme.

There is a wealth of talent at Quantum Advisory, so you will have access to leading technical knowledge and no-nonsense best practice. Our consulting team will also provide a robust and independent point of view.

## Experience it for yourself

To find out more about how we can help with your training requirements, please call Andrew Reid-Jones on 029 2083 7906 or email him at [andrew.reid-jones@quantumadvisory.co.uk](mailto:andrew.reid-jones@quantumadvisory.co.uk).

We offer great flexibility in terms of the training venue, the length of training sessions and dates. We can also incorporate training as part of regular trustee meetings to cover particular issues or to refresh learning.

*"I recently attended a trustee training session with a new fellow trustee. For my part this was by way of a 'refresher course' but one I would have no hesitation on recommending to fellow trustees to ensure our ability in continuing numerous commitments as trustees are carried out correctly."*

Tim Seviour, Company Trustee  
Addis Pension Scheme

## Who we are

Established in 2000, we are an independent, owner-managed actuarial and employee benefits consultancy that provides straight-talking, no-nonsense advice to employers and pension scheme trustees, all at a competitive price.

We design, maintain and review pension schemes and related employee benefits so that they operate efficiently and effectively and are valued by employees. This means that you can get on with doing the things that you do best, therefore saving you time and money.

## Products and services

- Actuarial services
- Administration of defined contribution and defined benefit pension schemes
- Banking, accounting and pensioner payroll
- Company advice
- Employee benefits consultancy
- Governance
- Investment consultancy
- Pension and employee benefit communications
- Risk benefits advice
- Pension scheme wind up
- Secretarial services to trustees
- Trustee training

## Your local contact

We have offices in Amersham, Birmingham, Cardiff and London. Call us to see how we can help with your pension and employee benefit challenges.

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