

Mastering Pension Funds: Governance, Regulation & Strategy

4 – 8 October 2027
Cape Town (South Africa)

UK Training

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Ref: 3079_137033 **Date:** 4 – 8 October 2027 **Location:** Cape Town (South Africa) **Fees:** 4900 GBP

Course Description

This intensive 5-day course provides a comprehensive overview of pension fund governance, regulatory compliance, and strategic investment management. Designed for fund trustees, administrators, and investment professionals, it covers key aspects of pension fund operations, risk management, and performance optimization.

Learning Objectives

- Understand the principles of effective pension fund governance and best practices
- Navigate complex regulatory environments and ensure compliance
- Develop and implement strategic investment policies aligned with fund objectives
- Master risk management techniques for pension fund portfolios
- Optimize fund performance through effective asset allocation and manager selection

Course Modules

Day 1: Foundations of Pension Fund Governance

- Introduction to pension fund governance structures
- Roles and responsibilities of trustees and administrators
- Fiduciary duties and ethical considerations
- Governance best practices and case studies

Day 2: Regulatory Framework and Compliance

- Overview of pension fund regulations
- Compliance requirements and reporting obligations
- Risk-based supervision approaches
- Adapting to evolving regulatory landscapes

Day 3: Strategic Investment Policy and Asset Allocation

- Developing a comprehensive investment policy statement
- Asset-liability management principles
- Strategic and tactical asset allocation techniques
- Incorporating ESG factors into investment strategies

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A graphic of a chessboard with several chess pieces (a king, a queen, a rook, and a pawn) positioned on it. The board is white and black, and the pieces are gold and silver. The text 'UK Training PARTNER' is overlaid on the right side of the board.

Day 4: Risk Management and Performance Measurement

- Identifying and assessing pension fund risks
- Implementing effective risk management frameworks
- Performance measurement and attribution analysis
- Benchmarking and peer comparison methodologies

Day 5: Operational Excellence and Future Trends

- Optimizing internal investment operations
- External manager selection and monitoring
- Emerging trends in pension fund management
- Technology and innovation in fund administration

Practical Wins for Participants

- Develop a tailored governance framework for your pension fund
- Create a comprehensive risk management strategy
- Design an optimized investment policy aligned with fund objectives
- Implement performance measurement and reporting best practices

A graphic of a chessboard with several chess pieces. A large gold king piece is in the foreground, with a silver pawn and a gold pawn behind it. In the background, there are concentric circles and the text 'UK Training PARTNER'.

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