

## Case example: **Charlie Hammond**



1/5

Within each module there is a section called 'Case examples' which feature interviews and case studies to help illustrate key learning points. They are not essential but help to bring the learning to life and you may be able to research some of these further online.



**Please note:** This case example is linked to the first scenario '**The new trustee**'.

# Case example: Charlie Hammond

## Introduction

This is Charlie. He was a trustee for the Howard Industries' occupational pension scheme for six years. Find out Charlie's views on being a trustee below.

## Why did you decide to become a trustee?

'I was talked into it by a friend at work. She thought I would be good at it.'

## Did you have to go to a lot of meetings?

'Not that many... there were about three or four a year. But don't think that being a trustee's all about board meetings, there's things that I had to do outside them too. I had to be prepared for all the meetings, and that can mean a lot of reading.'

## Did you ever have a problem with a fellow trustee?

'The people I worked with were really friendly. There was this one trustee though... kinda funny when I look back at it... but not at the time.'

At a Christmas party one year, a trustee called Terry had a few too many glasses of punch and admitted that he had recently been convicted of stealing money from the golf club, when he was the treasurer.

Although this wasn't to do with his employment at Howards, we still had to remove him as a trustee as his conviction wasn't spent yet.'

## Why did you leave?

'Well, my job changed and I was having to travel a lot. It was getting a bit difficult to get to board meetings, so I stepped down.'

I'm not entirely free from it though; I may not be a trustee any more, and I'm not involved in running the scheme... but I can still be held responsible for everything I did when I was.'

---



You have now completed this case example.