

Trustee toolkit downloadable



DB recovery plans, contributions and funding principles

Check your scheme

Each module features a section called 'Check your scheme'. This aims to embed the learning you have completed throughout the module by asking you questions about your own scheme or to check your scheme documents.

It is essential that you complete each 'Check your scheme' section relevant to your scheme type and size, so we have created this worksheet to help you do this offline.

Once you have completed the learning, work through the questions and learning points in this worksheet, noting your findings, to help you transfer the theoretical learning into the practical application of your own scheme.

If you have already completed the toolkit, the worksheet can serve as a useful refresher. Work through each section to identify any areas you should brush up on by redoing the module or reviewing your own scheme documents.

This worksheet applies to:

- DB schemes
- DB schemes with AVC
- hybrid schemes.

The Pensions
Regulator

Setting the contribution rate	For your notes
How does legislation impact on your own scheme rules in relation to setting the contribution rate?	
Which method?	
Which actuarial method did you use when you last calculated your technical provisions?	<input type="radio"/> The projected unit method <input type="radio"/> The current unit method
Deficit	
<p>Is your scheme in deficit?</p> <p>If so:</p> <ul style="list-style-type: none"> has the deficit increased since the last valuation? have you a recovery plan in place? 	<p><input type="radio"/> Yes <input type="radio"/> No</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p><input type="radio"/> Yes <input type="radio"/> No</p>
Schedule of contributions	
In the view of you and your colleagues, how difficult are the negotiations with your employer likely to be the next time you need to set a contribution rate?	