Trustee knowledge and understanding

Plan your learning

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| DC schemes only  Learning needs planner for trustee knowledge and understanding | | | | | | Personal development | | |
| **Unit 7 – Running a defined contribution (DC) occupational arrangement (including AVCs)**  This includes the principles relating to the operation of DC occupational arrangements and the risks borne by scheme members | | | | | | | | |
| **Knowledge required** | **Rate my skills**  **1 – No knowledge 5 – Highly skilled** | | | | | **My objectives** | **Timescale** | **Where to go next**  **The relevant Trustee toolkit module and related learning** |
| 7a: How DC occupational pension arrangements work | 1 | 2 | 3 | 4 | 5 |  |  | * Introducing pension scheme: Tutorial: What is a pension scheme? * How a DC scheme works (2014) |
| 7b: Administration procedures specific to DC occupational arrangements | 1 | 2 | 3 | 4 | 5 |  |  | * How a DC scheme works (2014): Tutorial: Transaction processing |
| 7c: The role of the employer in the calculation and collection of member contributions | 1 | 2 | 3 | 4 | 5 |  |  | * How a DC scheme works (2014): Tutorial: Transaction processing |
| 7d: The implications of the transfer of risk to members of DC occupational arrangements | 1 | 2 | 3 | 4 | 5 |  |  | * How a DC scheme works (2014): Tutorial: Good member outcomes and all other tutorials in this module |
| 7e: The implications of contracting out | 1 | 2 | 3 | 4 | 5 |  |  | * Pensions law: Tutorial: Pensions-related legislation |

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| **Unit 8 – Investment choice and the implications for members: Defined contribution (DC) occupational arrangements (including AVCs)**  This includes the principles relating to the choice of investments to be offered to members | | | | | | | | |
| **Knowledge required** | **Rate my skills**  **1 – No knowledge 5 – Highly skilled** | | | | | **My objectives** | **Timescale** | **Where to go next**  **The relevant Trustee toolkit module and related learning** |
| 8a: The implications for members for the investment strategy adopted by trustees | 1 | 2 | 3 | 4 | 5 |  |  | * Investment in a DC scheme: Tutorials: Setting the investment strategy, Default investment strategies and Alternative investment options |
| 8b: The importance of member understanding of investment risk | 1 | 2 | 3 | 4 | 5 |  |  | * Investment in a DC scheme: Tutorials: Default investment strategies and Alternative investment options |

Trustee knowledge and understanding: Plan your learning DC schemes only



2

How to contact us

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Free online learning for trustees

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