

Trustee knowledge and understanding

Plan your learning



DC schemes only		Personal development		
Learning needs planner for trustee knowledge and understanding				
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

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

How to contact us

Customer Support
The Pensions Regulator
Telecom House
125-135 Preston Road
Brighton
BN1 6AF

www.tpr.gov.uk/contact-us

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Free online learning for trustees

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