



HUMAN RESOURCES AND TRAINING | HRT-064

## Pension Scheme and Administration

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# Course content

## Why Attend

Why Attend Effective pension administration is essential for protecting employee benefits, ensuring regulatory compliance, maintaining accurate records, and delivering reliable retirement services. Pension professionals must understand scheme structures, contribution processes, benefits management, governance, and member communication. This course provides participants with practical tools to manage pension schemes efficiently while reducing risk and improving service quality.

**Course Methodology** This course uses an interactive and practical approach through presentations, case studies, process workshops, group discussions, compliance exercises, practical calculations, and real workplace examples.

## Course Objectives

- Understand the structure and purpose of pension schemes
- Identify key responsibilities in pension administration
- Manage scheme operations and compliance requirements
- Process pension benefits accurately and efficiently
- Strengthen records management and data governance
- Improve pension payroll and payment controls
- Enhance stakeholder communication and member support
- Understand strategic trends affecting pension administration

## Target Audience

- HR Professionals
- Pension Administrators
- Payroll Professionals
- Benefits Managers

# Course content

## Target Audience

- Finance Staff
- Compliance Officers
- Anyone responsible for retirement benefit administration

## Target Competencies

- Pension Administration
- Benefits Management
- Regulatory Compliance
- Records Management
- Payroll Controls
- Data Governance
- Risk Management
- Stakeholder Communication

## Course outline

### Day 1: Foundations of Pension Schemes and Administration

- Purpose and importance of pension schemes
- Pension administration roles and core responsibilities
- Main pension scheme types and structures
- Defined benefit and defined contribution arrangements
- Occupational pension schemes overview
- Pension administration lifecycle
- Regulatory environment and governance principles

# Course content

## Course outline

### **Day 2: Pension Scheme Operations and Compliance**

- Understanding scheme rules and contribution models
- Benefit entitlements and member rights
- Membership eligibility and automatic enrolment processes
- Documentation and recordkeeping standards
- Maintaining accurate data and resolving discrepancies
- Annual reporting duties and regulatory compliance obligations

### **Day 3: Benefits Management and Payment Processing**

- Pension benefit calculations and payment methods
- Transfer in and transfer out procedures
- Updating member records after life events
- Pre-retirement checks and entitlement verification
- Managing changes in benefits and scheme adjustments
- Regulatory implications of payment decisions

### **Day 4: Records Management, Governance, and Pensioner Payroll**

- Best practices in pension records management
- Electronic records systems and data protection rules
- Retention, storage, and secure disposal of records
- Pensioner payroll processing and recurring payments
- Internal controls for payment accuracy
- Risk management in pension administration

### **Day 5: Strategic Pension Administration and Retirement Planning**

# Course content

## Course outline

- Strategic goals of effective pension administration
- Pension funding and investment oversight basics
- Governance frameworks and audit practices
- Communicating effectively with members and stakeholders
- Emerging trends in pensions and legislative updates
- Final review and practical action planning

# Seminar dates

## Available seminar dates

Live dates and pricing for Pension Scheme and Administration generated from the course details page.

| Date                   | Location                | Format    | Fee      |
|------------------------|-------------------------|-----------|----------|
| 3 - 7 August 2026      | Barcelona - Spain       | Classroom | €4,250.- |
| 10 - 14 August 2026    | London - U.K            | Classroom | €3,850.- |
| 7 - 11 September 2026  | Barcelona - Spain       | Classroom | €4,250.- |
| 14 - 18 September 2026 | Istanbul - Turkey       | Classroom | €3,850.- |
| 5 - 9 October 2026     | Kuala Lumpur - Malaysia | Classroom | €2,250.- |
| 12 - 16 October 2026   | London - U.K            | Classroom | €3,850.- |
| 9 - 13 November 2026   | Munich - Germany        | Classroom | €4,250.- |
| 16 - 20 November 2026  | Amsterdam - Netherlands | Classroom | €4,200.- |
| 7 - 11 December 2026   | London - U.K            | Classroom | €4,250.- |
| 14 - 18 December 2026  | Istanbul - Turkey       | Classroom | €3,850.- |
| 21 - 25 December 2026  | Frankfurt - Germany     | Classroom | €3,850.- |

### Live online option

Online delivery is available at €1,850.-.