Trade Union Investment Management Training Course

Professional Development Training Course Outline

Category	Trade Unions	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today’s rapidly evolving global economy, trade unions are increasingly expected to operate as financially sustainable, strategically governed, and investment-driven institutions capable of protecting workers’ interests while generating long-term value. Trade Union Investment Management Training Course is designed to strengthen the capacity of professionals in modern investment governance, portfolio management, sustainable finance, financial risk management, and institutional wealth creation. The course equips participants with practical tools and advanced strategies for managing union-owned assets, pension schemes, real estate investments, SACCOs, social enterprises, infrastructure investments, and income-generating projects in alignment with international labor standards and emerging economic trends.

This highly practical and results-oriented program integrates contemporary concepts such as ESG investing, financial resilience, digital transformation, strategic asset allocation, impact investing, fiduciary compliance, investment diversification, pension sustainability, data-driven financial decision-making, and corporate governance excellence. Participants will gain actionable insights through real-world case studies, simulations, investment analytics, and policy frameworks that support sustainable growth and financial accountability within trade unions. The training empowers institutions to optimize returns, minimize investment risks, improve transparency, strengthen stakeholder confidence, and build future-ready investment portfolios in an increasingly competitive and technology-driven financial environment.

Programme Curriculum

Trade Union Investment Management Training Course

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Course Duration

5 days

Course Objectives

1. Develop strategic competencies in Trade Union Investment Governance and institutional financial leadership.
2. Strengthen knowledge in Portfolio Management and Asset Diversification Strategies.
3. Enhance capacity in ESG Investing and Sustainable Finance Practices.
4. Equip participants with tools for Financial Risk Assessment and Investment Analytics.
5. Improve understanding of Pension Fund Management and Retirement Planning.
6. Build expertise in Digital Financial Transformation and FinTech Integration.
7. Strengthen compliance with Corporate Governance and Fiduciary Responsibility Standards.
8. Enhance skills in Infrastructure Financing and Impact Investment Management.
9. Promote effective Investment Policy Formulation and Strategic Planning.
10. Improve institutional performance through Data-Driven Financial Decision-Making.
11. Strengthen competencies in Real Estate Investment and Cooperative Wealth Creation.
12. Develop sustainable approaches to Union-Owned Enterprise Management and Revenue Generation.
13. Build resilient institutions through Financial Sustainability and Economic Empowerment Strategies.

Target Audience

1. Trade Union General Secretaries and Presidents
2. Trade Union Finance and Investment Officers
3. Pension Fund Trustees and Administrators
4. SACCO and Cooperative Society Managers
5. Human Resource and Industrial Relations Managers
6. Board Members of Union-Owned Enterprises
7. Government Labor and Social Protection Officers
8. Financial Analysts, Auditors, and Compliance Officers

Course Modules

Module 1: Trade Union Investment Governance

- Principles of investment governance
- Fiduciary responsibilities and accountability
- Governance frameworks for union investments
- Ethical leadership and transparency
- Policy formulation and institutional controls
- **Case Study:** Analysis of governance reforms in a trade union pension fund that improved transparency and financial performance.

Module 2: Portfolio Management and Asset Allocation

- Investment portfolio construction
- Strategic asset allocation techniques
- Diversification and wealth preservation
- Performance measurement and benchmarking
- Alternative investment opportunities
- **Case Study:** Evaluation of diversified investment portfolios used by labor organizations to reduce market volatility risks.

Module 3: Financial Risk Management

- Enterprise risk management frameworks
- Investment risk identification and mitigation
- Market, liquidity, and operational risks
- Financial forecasting and stress testing
- Crisis management and financial resilience
- **Case Study:** Assessment of how institutional investors managed financial shocks during economic downturns.

Module 4: Pension Fund and Retirement Investment Management

- Pension fund governance structures
- Retirement fund sustainability strategies
- Regulatory compliance and reporting
- Long-term investment planning
- Actuarial valuation fundamentals
- **Case Study:** Review of successful pension fund restructuring initiatives that improved retirement security.

Module 5: ESG Investing and Sustainable Finance

- Environmental, Social, and Governance principles
- Responsible investment frameworks
- Climate finance and green investments
- Social impact investment strategies
- Sustainability reporting and metrics
- **Case Study:** Examination of ESG investment models adopted by international labor institutions.

Module 6: Digital Finance and FinTech Innovation

- Digital transformation in financial management
- FinTech tools for investment monitoring

- Artificial intelligence in investment analysis
- Cybersecurity and digital risk management
- Blockchain applications in finance
- **Case Study:** Exploration of digital investment platforms improving financial accountability and operational efficiency.

Module 7: Real Estate and Infrastructure Investment

- Real estate investment strategies
- Infrastructure financing models
- Public-private partnership investments
- Feasibility studies and project appraisal
- Revenue generation through property assets
- **Case Study:** Analysis of successful trade union real estate projects generating sustainable income streams.

Module 8: Strategic Financial Planning and Institutional Sustainability

- Financial sustainability frameworks
- Strategic investment planning
- Revenue diversification strategies
- Stakeholder engagement and communication
- Monitoring, evaluation, and performance management
- **Case Study:** Review of financially sustainable labor organizations with strong investment and governance systems.

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

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