Training course on Defined Contribution (DC) Plan Administration and Oversight

Professional Development Training Course Outline

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

Course Introduction

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Programme Curriculum

Training Course on Defined Contribution (DC) Plan Administration and Oversight

Introduction

Training Course on Defined Contribution (DC) Plan Administration and Oversightis designed to equip participants with the essential knowledge and practical skills necessary for effective management and oversight of defined contribution pension plans. As employers continue to shift from traditional defined benefit plans to defined contribution plans, understanding the complexities of DC plan administration has become increasingly important. This course addresses the critical aspects of plan design, compliance, investment options, and participant education, enabling professionals to ensure the smooth operation and success of DC plans.

Throughout this course, attendees will explore key topics such as plan governance, fiduciary responsibilities, investment strategies, and regulatory compliance. The curriculum combines theoretical insights with practical applications, featuring case studies and interactive discussions that engage participants in real-world scenarios. By the end of the training, attendees will have a comprehensive understanding of how to effectively administer and oversee DC plans, ensuring that participants are well-prepared for retirement. Additionally, the course will address potential challenges, such as participant engagement, market volatility, and regulatory changes, ensuring participants are equipped to navigate the complexities of DC plan administration.

Course Objectives

1. Understand the fundamentals of defined contribution plan administration.
2. Analyze the components and design of DC pension plans.
3. Explore funding and contribution strategies for DC plans.
4. Evaluate investment options available to plan participants.
5. Assess regulatory compliance and reporting requirements.
6. Communicate effectively about DC plan concepts.
7. Identify challenges and solutions in DC plan management.
8. Conduct feasibility studies for plan enhancements.
9. Understand participant education and engagement strategies.
10. Explore case studies of successful DC plan administration.
11. Foster collaboration among stakeholders in pension management.
12. Create action plans for improving DC plan oversight.
13. Stay informed about changes in retirement legislation and policies.

Target Audience

1. Pension fund administrators
2. HR professionals managing DC plans
3. Financial advisors
4. Compliance officers
5. Graduate students in finance or human resources
6. Consultants in retirement plan management
7. Corporate finance professionals
8. Non-profit organization leaders focused on retirement issues

Course Duration: 5 Days

Course Modules

Module 1: Introduction to Defined Contribution Plans

- Overview of defined contribution pension plans and their significance.
- Key terminology related to DC plan administration.
- Understanding the regulatory framework governing DC plans.
- Discussion of common misconceptions about defined contribution plans.
- Case studies on effective DC plan administration.

Module 2: Design and Structure of DC Plans

- Analyzing different types of DC plan designs (401(k), 403(b), etc.).
- Evaluating the pros and cons of various DC structures.
- Understanding contribution methods and matching options.
- Strategies for aligning plan design with organizational objectives.
- Case studies on innovative DC plan design.

Module 3: Funding and Contribution Strategies

- Overview of contribution requirements and employer responsibilities.
- Analyzing employee participation rates and contribution levels.
- Evaluating automatic enrollment and escalation features.
- Strategies for managing contribution shortfalls.

- Case studies on successful funding strategies for DC plans

Module 4: Investment Options for DC Plans

- Overview of investment options available to plan participants.
- Analyzing the role of target-date funds and managed accounts.
- Evaluating investment risk and diversification strategies.
- Strategies for participant education on investment choices.
- Case studies on effective investment strategies in DC plans.

Module 5: Regulatory Compliance and Reporting

- Overview of regulatory requirements affecting DC plans (ERISA, IRS).
- Understanding fiduciary duties and responsibilities.
- Analyzing reporting obligations and disclosures for DC plans.
- Strategies for ensuring compliance and avoiding penalties.
- Case studies on compliance challenges in DC plan administration.

Module 6: Participant Education and Engagement

- Understanding the importance of participant education in DC plans.
- Techniques for developing effective communication strategies.
- Evaluating tools for engaging participants in their retirement planning.
- Strategies for improving participant decision-making.
- Case studies on successful participant education programs.

Module 7: Challenges in DC Plan Management

- Identifying common challenges in DC plan administration.
- Analyzing market volatility and its impact on participant accounts.
- Understanding demographic changes and their implications.
- Strategies for addressing challenges in participant engagement.
- Case studies on overcoming challenges in DC plan management.

Module 8: Future Trends in DC Plan Administration

- Exploring emerging trends in defined contribution plan management.
- The impact of technology and digital tools on DC plans.
- Innovations in retirement plan design and investment options.
- Discussion of sustainability and environmental considerations in DC plans.
- Case studies on future-ready DC plan strategies.

Training Methodology

- **Interactive Workshops:** Facilitated discussions, group exercises, and problem-solving activities.
- **Case Studies:** Real-world examples to illustrate successful community-based surveillance practices.
- **Role-Playing and Simulations:** Practice engaging communities in surveillance activities.
- **Expert Presentations:** Insights from experienced public health professionals and community leaders.
- **Group Projects:** Collaborative development of community surveillance plans.
- **Action Planning:** Development of personalized action plans for implementing community-based surveillance.
- **Digital Tools and Resources:** Utilization of online platforms for collaboration and learning.
- **Peer-to-Peer Learning:** Sharing experiences and insights on community engagement.

- **Post-Training Support:** Access to online forums, mentorship, and continued learning resources.

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

- Participants must be conversant in English.
- Upon completion of training, participants will receive an Authorized Training Certificate.
- The course duration is flexible and can be modified to fit any number of days.
- Course fee includes facilitation, training materials, 2 coffee breaks, buffet lunch, and a Certificate upon successful completion.
- One-year post-training support, consultation, and coaching provided after the course.
- Payment should be made at least a week before the training commencement to Fineskill Training Center account, as indicated in the invoice, to enable better preparation.

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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