Training course on Pension Scheme Funding and Valuation Techniques

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

Training Course on Pension Scheme Funding and Valuation Techniques is designed to equip professionals with the essential skills and knowledge necessary to effectively fund and value pension schemes. As pension funds navigate complex financial landscapes and regulatory environments, understanding funding strategies and valuation methods is crucial for ensuring the sustainability of retirement benefits. This course focuses on the principles of pension funding and valuation, enabling participants to make informed decisions that balance obligations and investment strategies. Participants will explore key concepts such as funding methodologies, actuarial valuations, regulatory requirements, and risk management. The curriculum integrates theoretical frameworks with practical applications, featuring case studies and hands-on exercises that allow attendees to engage with real-world scenarios. By the end of the training, participants will be well-prepared to implement effective funding and valuation techniques that enhance the financial health of pension schemes. This comprehensive approach aims to empower professionals to navigate the intricacies of pension funding and valuation in the modern financial landscape.

Programme Curriculum

Training Course on Pension Scheme Funding and Valuation Techniques

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Course Objectives

1. Understand the fundamentals of pension scheme funding and valuation.
2. Analyze different funding methodologies for pension schemes.
3. Evaluate the actuarial valuation process and its significance.
4. Explore regulatory requirements affecting pension funding and valuation.
5. Assess the impact of investment strategies on funding levels.
6. Discuss techniques for managing funding risks.
7. Develop skills in communicating funding and valuation results to stakeholders.
8. Conduct scenario analysis for funding projections.
9. Foster collaboration among actuaries, fund managers, and trustees.
10. Create actionable plans for implementing funding and valuation techniques.
11. Stay informed about emerging trends in pension funding and valuation.
12. Measure the effectiveness of funding strategies and valuation practices.
13. Build finding strategies.

Target Audience

1. Pension fund managers
2. Actuaries and actuarial analysts
3. Financial analysts and consultants
4. Compliance officers
5. Risk management professionals
6. HR and benefits managers
7. Graduate students in finance or actuarial science
8. Trustees and board members of pension schemes

Course Duration: 5 Days

Course Modules

Module 1: Introduction to Pension Scheme Funding

- Overview of pension funding concepts and principles.
- Importance of funding in pension scheme sustainability.
- Key terminology related to pension funding.
- Historical context and evolution of funding practices.
- Case studies on successful funding strategies.

Module 2: Funding Methodologies

- Overview of different funding methodologies (e.g., pay-as-you-go, fully funded).

- Techniques for assessing funding levels and liabilities.
- Evaluating the pros and cons of various funding approaches.
- Real-world examples of funding methodology applications.
- Best practices for selecting appropriate funding strategies.

Module 3: Actuarial Valuation Process

- Understanding the actuarial valuation process and its significance.
- Techniques for calculating present value of pension liabilities.
- Evaluating assumptions used in valuations (discount rates, mortality rates).
- Importance of regular valuations for pension scheme health.
- Case studies on actuarial valuation methodologies.

Module 4: Regulatory Frameworks and Compliance

- Overview of regulations affecting pension funding and valuation.
- Key legislation impacting pension scheme management.
- Understanding compliance requirements for funding and valuations.
- Engaging with regulators and stakeholders on funding issues.
- Case studies on regulatory challenges and solutions.

Module 5: Investment Strategies and Funding Levels

- Overview of investment strategies for pension funds.
- Techniques for assessing the impact of investment returns on funding levels.
- Understanding asset-liability matching in funding strategies.
- Evaluating the role of diversification in investment approaches.
- Real-life examples of investment strategies influencing funding.

Module 6: Managing Funding Risks

- Identifying and quantifying risks associated with pension funding.
- Techniques for mitigating funding risks (interest rate risk, longevity risk).
- Developing risk management frameworks for pension schemes.
- Best practices for monitoring and reporting funding risks.
- Case studies on effective risk management in funding.

Module 7: Communicating Funding and Valuation Results

- Importance of effective communication in pension funding discussions.
- Techniques for presenting funding results to stakeholders.
- Best practices for educating trustees and members on funding issues.
- Developing tools and resources for effective communication.
- Real-world examples of successful communication strategies.

Module 8: Creating Action Plans for Funding and Valuation Implementation

- Steps for developing comprehensive funding and valuation strategies.
- Engaging teams and stakeholders in the planning process.
- Setting measurable objectives and timelines for implementation.
- Monitoring and adapting funding strategies over time.
- Presenting funding and valuation plans to stakeholders for approval.

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

Start Date	End Date	Location	Price
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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