

# INVESTMENT TRAINING FOR TRUSTEES

## TRAINING NEEDS ASSESSMENT

We offer a confidential knowledge and understanding assessment survey. The survey is completed by Trustees ranking their knowledge in key areas of pensions and investment. Once completed a report is produced to help identify knowledge gaps and prioritise training topics.

## TRAINING SESSIONS

We provide a range of training on a wide range of issues for trustees. The training can be delivered in person following trustees' meetings or at annual training days. Alternatively training can be provided via narrated PowerPoint presentations available for trustees to stream at a time that best suits them.

The objective is to introduce topics and concepts that may be new to some trustees whilst ensuring there is sufficient detail to keep the presentation of benefit as a refresher to trustees with prior knowledge of the subject matter.

The presentations are primarily aimed at trustees of pension schemes and separate presentations are made for Defined Benefit and Defined Contribution types of scheme. Bespoke training can be prepared tailored to your requirements. Examples of training topics include:

- Introduction to major asset classes
- Overview of recent legislation and best practice
- Asset allocation and benchmarking
- Selecting an investment manager and monitoring performance
- Suitable investment options for members of DC schemes
- Mitigating ESG and Climate change investment risks

## WHO WOULD FIND THIS SERVICE USEFUL?

- Trustees of Defined Contribution ("Money Purchase") pension schemes
- Trustees of Defined Benefit ("Final Salary") pension schemes

## HOW LONG ARE THE PRESENTATIONS?

The presentations length can be tailored to your needs. Presentations are made at our offices in Guernsey and Jersey.

## CHARGES

The cost of the training session will depend on the length and delivery method. The charges for the training survey and sessions can be agreed in advance.

## BWCI GROUP

The BWCI Group is the largest group of actuaries and consultants in the Channel Islands, with offices in both Guernsey and Jersey. It is a member of Abelica Global, the international network of leading independent actuarial consulting firms.

## FURTHER INFORMATION

For further information on this and other investment services provided by the BWCI Group please contact [invservices@bwcigroup.com](mailto:invservices@bwcigroup.com), or visit our website at [www.bwcigroup.com](http://www.bwcigroup.com).



### **Focused**

We are focused on our clients' needs and provide a service to suit their individual requirements.

### **Practical**

We deliver solutions in practical, commercial and cost-effective ways.

### **Innovative**

We seek innovative solutions to complex financial problems using advanced analytical tools and software.

**Guernsey office** | PO Box 68, Albert House  
South Esplanade, St Peter Port  
Guernsey, GY1 3BY  
**Tel** | +44 (0)1481 728432  
**Fax** | +44 (0)1481 724082  
**Web** | [www.bwcigroup.com](http://www.bwcigroup.com)

**Jersey office** | Osprey House  
5-7 Old Street, St Helier  
Jersey, JE2 3RF  
**Tel** | +44 (0)1534 880112  
**Web** | [www.bwcigroup.com](http://www.bwcigroup.com)