



Managing Pension and Retirement Funds Effectively

12th – 16th November 2018

Protea Hotel O.R. Tambo, Kempton Park, Johannesburg South Africa.

NQF Level 6, with 5 credits towards a Diploma in Management

Learning Outcomes

- Addressing the Challenges facing the Pension Fund Industry
- Applying De-risking Strategies for your pension fund
- Understanding Corporate Governance and it's important to pension fund industry?
- Surplus legislation, its impact and its Implications
- Trustee forum: what do current market conditions mean for you as a fiduciary?
- Addressing Trustees key duties and powers as prescribed by the Fund Rules, regulations and legislation
- Monitoring and evaluation of pension funds: reviewing the Service Legal Agreement (SLAs)
- How surplus returns should affect Employee Benefit Plans
- Innovation in the pension and retirement fund Industry

Who Should Attend?

- Trustees and Fund Managers
- Fund Administrators
- Employer and Worker Representatives
- Human Resource Directors and Managers
- Employee Benefits Directors and Managers
- Benefit Administrators
- Portfolio Managers
- Pension Fund Risk Managers
- Pension Fund Communication Professionals
- Member Distribution Managers
- Pension Managers and Pension Scheme Managers
- Pension Officers and Registrars

BA, BA Hons, MA, Diploma in Financial Planning

This Facilitator was with Spoorntet for over 17 years, where he occupied various management positions up to the level of an Executive Manager HR, overseeing Recruitment and Selection, Labour Relations, Professional Services, EAP and HR Operations in the Line Departments. He built on his experience at Spoorntet and is currently in the skills development area, where he lectures at several educational and training institutions in South Africa. His focus areas are: Taxation, Financial Planning, Economics, Financial Management, Accounting (Both in the Public Service and Private Sector), Cost Management, Business Ethics, Corporate Strategy and Strategic Management. As a Lecturer he has presented a number of training programs at Regional and Local Government. Which include Public Financial Management and Budgeting, Finance and Reporting, Asset Management, Policy Development and Analysis, Advanced SCM and Procurement in the Public Sector, Performance and Risk based Auditing amongst other



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