

DIPLOMA CENTRE

Certificate in Pensions and Applied Trusteeship



MODULE 1: COURSE INTRODUCTION; LEGISLATIVE AND REGULATORY FRAMEWORK

SESSION 1	TIME	DELIVERY
Tuesday 4 October 2022	6:00pm – 9:00pm	Online
1	Course Introduction: <i>Geraldine Rafferty, Barrister, Course Leader, Law Society of Ireland</i>	
2	Overview of Pensions Law in Ireland: pensions legislation, pensions regulatory bodies, registered administrators, internal dispute resolution. <i>Stephen Gillick, Partner, Mason Hayes Curran LLP</i>	
3	Pensions Legislation Part 1: Legislative and Regulatory Framework EU Law; Pensions Act 1990 as amended and related regulations; Taxes Consolidation Act 1997; Regulations, IORPS II. Trust Law, trustee duties, standard of care and powers. Interaction with Employment Law, Family Law. <i>Eleanor Cunningham, Partner, McCann FitzGerald LLP</i>	
4	Pensions Legislation Part 2: Data Protection: Data Protection Act 2018; General Data Protection Regulations; Data Protection Commissioner. ONLINE RELEASE <i>Aoife Sexton, Chief Privacy Officer, Truata</i>	

3 hrs. Gen. CPD

SESSION 2	TIME	DELIVERY
Tuesday 11 October 2022	6:00pm – 9:00pm	Online
1	The Financial Services and Pensions Ombudsman: Financial Services and Pensions Ombudsman Act 2017. The powers of the Pensions Ombudsman, the types of complaints received and the various methods of dispute resolution. Decisions of FPSO. <i>Paul Kenny, Former Pensions Ombudsman, Director at Trustee Decisions Limited</i>	
2	The Pensions Authority: A look at the structure and functions of the Pensions Authority. Supervisory and Enforcement Powers. Support for Trustees. <i>Kathleen Gormley, Barrister, The Pensions Authority</i>	
3.	Other Regulatory Bodies: The role of the Workplace Relations Commission, <i>Conor Stokes, Adjudication Officer, Workplace Relations Commission</i>	

3hrs. Gen. CPD*

MODULE 2: THE FUTURE OF PENSIONS IN IRELAND

SESSION 3	TIME	DELIVERY
Tuesday 18 October 2022	6:00pm – 9:00pm	Online
1.	Pension Adjustment Orders: What is a pension adjustment order? Who are the trustees? The types of pension adjustment orders, pension splitting and pension advisors. Case studies. <i>Muriel Walls, Consultant, Spain Toomey & Walls Solicitors</i>	
2.	The Main Types of Pension Schemes: Defined contribution; defined benefit; hybrid; personal pension plans; personal retirement savings accounts and s121 of the Pensions Act. <i>Tom Mulcahy, Benefits Consultant Lead, Aon</i>	
3.	Other Regulatory Bodies: Data Protection Commission in the Context of Pensions <i>Sarah McCague, Partner, Arthur Cox</i>	

3hrs Gen CPD

MODULE 3: PENSION SCHEME STRUCTURES; PENSION ADJUSTMENT ORDERS; PENSIONS IN A COMMERCIAL TRANSACTION

SESSION 4	TIME	DELIVERY
Tuesday 25 October 2022	6:00pm – 9:00pm	Online
1	Pension in a Commercial Transaction: A look at pensions considerations in a commercial transaction from the perspective of the vendor/purchaser, pension due diligence and pension warranties. <i>Liam Connellan, Partner, ByrneWallace LLP</i>	

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- 2 **Future of Pension in Ireland Part 1:** An examination of recent developments in pensions law in Ireland. IORPS II, Master Trusts, pension scheme consolidation.
Stephen Gillick, Partner, Mason Hayes Curran LLP
- 3 **Future of Pension in Ireland Part 2:** examining the future of defined benefit schemes and auto enrolment.
Stephen Gillick, Partner, Mason Hayes Curran LLP
- 4 **Public Sector Pensions:** An analysis of the different types of public sector pension schemes, retirement benefits, and reform in the area. [ONLINE RELEASE](#)
Sonya Dixon, Barrister

4 hrs. Gen. CPD*

SESSION 5	TIME	DELIVERY
Tuesday 1 November 2022	6:00pm – 9:00pm	Online

Workshop 1:

Liam Connellan, Partner, ByrneWallace LLP

1.5hrs Gen. CPD & 1hr M&PD

MODULE 4: THE ROLE OF TRUSTEES; EMPLOYER OBLIGATIONS

SESSION 6	TIME	DELIVERY
Tuesday 08 November 2022	6:00pm – 8:00pm	Online

- 1 **The Role of Pension Scheme Trustees:** An examination of the area of trust law and a look at the duties and obligations of trustees under current legislation with reference to case law and trust law principles.
Kathleen Gormley, Barrister, The Pensions Authority
- 2 **Funding/Actuarial Issues in Defined Benefit Schemes:** A look at defined benefit promises, the tax advantages of approved benefit schemes and the key regulatory requirements of a pension scheme.
Munro O'Dwyer, Partner, PwC
- 3 **Pension Investment Issues:** A prudent look at the area of investment and pensions.
Tommy Nielsen, Trustee Services Director, Independent Trustee Company,
- 4 **Employer Obligations:** A review of the Pensions Act 1990 as it applies to employers [ONLINE RELEASE](#)
Orla Ormsby, Head of Legal, Intermediate Division, Irish Life

4hrs. Gen. CPD*

SESSION 7	TIME	DELIVERY
Tuesday 15 November 2022	6:00pm – 8:00pm	Online

Workshop 2:

Kirstie Flynn, Director, Willis Towers Watson

1hrs. Gen. CPD & 1hr M&PD

MODULE 5: TAXATION ISSUES; WINDING UP & RESTRUCTURING OF SCHEMES; POST-RETIREMENT ISSUES; SCHEME GOVERNANCE;

SESSION 8	TIME	DELIVERY
Tuesday 22 November 2022	6.00 pm – 8.30	Online

- 1 **Pension Scheme Governance:** How can trustees control the proper management and oversight of their pension scheme?
Stephen Gillick, Partner, Mason Hayes Curran LLP
- 2 **Pensions and insolvency:** Security of Pension assets, recent case law, Personal Insolvency Act 2012.
Ian Devlin, Partner, William Fry LLP

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- 3 **Pensions litigation:** A look at the types of dispute that arise and the various methods of dispute resolution.

Deirdre Cummins, Of Counsel, Arthur Cox LLP

- 4 **Post retirement issues,** the changing state pension age and integration with the State pension.

ONLINE RELEASE

Stephen Gillick, Partner, Mason Hayes Curran LLP

4hrs Gen. CPD*

MODULE 5: TAXATION ISSUES; WINDING UP & RESTRUCTURING OF SCHEMES; POST-RETIREMENT ISSUES; SCHEME GOVERNANCE;

SESSION 9	TIME	DELIVERY
Tuesday 29 November 2022	6:00pm – 9:00pm	Online

- 1 **Taxation Issues**

Aidan McLoughlin, Group Managing Director, Independent Trustee Company

- 2 **Winding-Up and Restructuring Pension Schemes:** an investigation into why and how pension schemes are wound up or restructured. Priority order, conflicts of interest; contribution demands, cessation of accrual, Section 50 directions, use of contingent assets in scheme funding.

Jamie McConville, Pensions Solicitor, Zurich Ireland

- 3 **Cross-border Pension Schemes:** The development of EI cross-border schemes.

Patrick O'Connor, Senior Associate, Mason Hayes Curran

3 hrs. Gen. CPD*

SESSION 10	TIME	DELIVERY
Tuesday 6 December 2022	6:00pm – 8:00pm	Online

Workshop 3:

Jane McKeever, Law Consultant, William Fry

1.5hrs. Gen. CPD & 1hr M&PD

2,500 WORD ASSIGNMENT DUE ON 30 January 2023

Please note that topics & dates may be subject to change. Draft timetable as of October 2022.

* Gen = General, M&PD = Management and Professional Development, Reg = Regulatory and eLearning = eLearning CPD credits. **CPD Note:** The number of hours of CPD that you may claim in relation to your diploma/certificate course will depend on the way in which you access each of the individual sessions. For further information please visit the course homepage on our website: www.lawsociety.ie/diplomacentre