

DIPLOMA CENTRE

Certificate in Pensions Law and Applied Trusteeship



MODULE 1: COURSE INTRODUCTION; LEGISLATIVE AND REGULATORY FRAMEWORK

SESSION 1	TIME	DELIVERY
Wednesday 25 October 2023	6:15 pm – 8:15pm	Online

- 1 **Course Introduction:**
Geraldine Rafferty, Barrister, Course Leader, Law Society of Ireland
- 2 **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.
Paul Kenny, Former Pensions Ombudsman, Director at Trustee Decisions Limited
- 3 **Overview of Pensions Law in Ireland:** pensions legislation, pensions regulatory bodies, registered administrators, internal dispute resolution.
Stephen Gillick, Partner, Mason Hayes Curran LLP

2 hrs. Gen. CPD

SESSION 2	TIME	DELIVERY
Wednesday 8 November 2023	6:15pm - 9:15pm	Online

- 1 **The Pensions Authority:** A look at the structure and functions of the Pensions Authority. Supervisory and Enforcement Powers. Support for Trustees.
Kathleen Gormley, Barrister, The Pensions Authority
- 2 **Pensions Legislation: 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
Eleanor Cunningham, Partner, McCann FitzGerald LLP
- 3 **The Data Protection Commission in the Context of Pensions** a comprehensive overview of data protection issues and the role of the Data Protection Commissioner as it applies to pensions law.
Sarah McCague, Partner, Arthur Cox
- 4 **The role of the Workplace Relations Commission in Pensions.** An overview of the role of the WRC and cases that come before it in relation to pensions. **[ONLINE RELEASE]**
Conor Stokes, Adjudication Officer, Workplace Relations Commission

4 hrs. Gen. CPD*

MODULE 2: THE FUTURE OF PENSIONS IN IRELAND

SESSION 3	TIME	DELIVERY
Wednesday 22 November 2023	6:15pm – 9:15pm	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.
Liam Connellan, Partner, ByrneWallace
- 2 **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.
Muriel Walls, Consultant, Spain Toomey & Walls

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- 3 **The Main Types of Pension Schemes:** Defined contribution; defined benefit; hybrid; personal pension plans; personal retirement savings accounts and s121 of the Pensions Act.

3 hrs. Gen. CPD*

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

SESSION 4	TIME	DELIVERY
Wednesday 29 November 2023	6:15pm - 9:15pm	Online

1 **Workshop 1:**

Liam Connellan, Partner, ByrneWallace LLP

- 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, examining the future of defined benefit schemes and auto enrolment.

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

3 hrs Gen. CPD & 1 hr M&PD

SESSION 5	TIME	DELIVERY
Wednesday 6 December 2023	6:15pm – 9:15pm	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.

Patrick O'Connor, Senior Associate, Mason Hayes Curran

- 2 **Pension Investment Issues:** A prudent look at the area of investment and pensions.

Tommy Nielsen, Trustee Services Director, Independent Trustee Company

- 3 **Employer Obligations:** A review of the Pensions Act 1990 as it applies to employers.

Orla Ormsby, Head of Legal, Intermediate Division, Irish Life

- 4 **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.

[ONLINE RELEASE]

4 hrs. Gen. CPD*

MODULE 4: THE ROLE OF TRUSTEES; EMPLOYER OBLIGATIONS

SESSION 6	TIME	DELIVERY
Wednesday 10 January 2024	2:00 pm	Online Release

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1 **Pensions litigation:** A look at the types of disputes that arise and the various methods of dispute resolution. **[ONLINE RELEASE]**
Deirdre Cummins, Of Counsel, Arthur Cox LLP

2 **Pensions and insolvency:** Security of Pension assets, recent case law, Personal Insolvency Act 2012. **[ONLINE RELEASE]**
Ian Devlin, Partner, William Fry LLP

2 hrs Gen. CPD*

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

SESSION 7	TIME	DELIVERY
Wednesday 17 January 2024	6:15pm – 9:15pm	Online

1 **Workshop 2:**

Kirstie Flynn, Director, Willis Towers Watson

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

SESSION 8	TIME	DELIVERY
Thursday 18 January 2024	6:15pm – 7:30pm	Online

1 **Public Sector Pensions:** An analysis of the different types of public sector pension schemes, retirement benefits, and reform in the area.

Sonya Dixon, Barrister at the Law Library

1 hrs. Gen. CPD*

SESSION 9	TIME	DELIVERY
Wednesday 24 January 2024	6:15pm - 9:15pm	Online

1 **Taxation Issues:** An examination of the current taxation rules in relation to pensions including the role of the Revenue Commissioners.

Aidan McLoughlin, Group Managing Director, Independent Trustee Company

2 **Pension Scheme Governance:** How can trustees control the proper management and oversight of their pension scheme?

Stephen Gillick, Partner, Mason Hayes Curran LLP

3 **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.

Sarah McCague, Partner, Arthur Cox

4 **Cross-border Pension Schemes:** The development of EU cross-border schemes.

[ONLINE RELEASE]

Patrick O'Connor, Senior Associate, Mason Hayes Curran

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

[ONLINE RELEASE]

Stephen Gillick, Partner, Mason Hayes Curran LLP

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5 hrs. Gen. CPD*

SESSION 10	TIME	DELIVERY
Wednesday 31 January 2024	6:15pm – 8:15pm	Online
Workshop 3:		
TBC		
1 hrs. Gen. CPD & 1 hr M&PD		

2,500 WORD ASSIGNMENT DUE ON 12 March 2024

Please note that topics & dates may be subject to change. Draft timetable as of November 2023.

* 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