



An tÚdarás Pinsean  
The Pensions Authority

**DIPLOMA CENTRE**  
CERTIFICATE IN  
PENSIONS LAW AND  
APPLIED TRUSTEESHIP

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# DIPLOMA CENTRE

## CERTIFICATE IN PENSIONS LAW AND APPLIED TRUSTEESHIP

This certificate has been approved by The Pensions Authority as a course that meets the Authority's requirement in relation to trustee qualifications under paragraph 107 of the Code of Practice for trustees of occupational pension schemes and trust RACs.

**START DATE** Thursday 23 February 2023

### DELIVERY

Online lectures on Thursdays from 6pm to 9pm. Also available to view on demand.

### ASSESSMENT

2,500 word written assignment

**FEE** €1,900 | €1,725 (Law Society members)

### PROGRAMME OVERVIEW

Gain a comprehensive understanding of the most up-to-date position on pensions law and trusteeship in Ireland. Delivered by professional trustees and industry experts, the course begins with an examination of the legislative and regulatory framework applicable to pensions in Ireland. The functions and powers of the Pensions Authority, the Revenue Commissioners, and the Financial Services and Pensions Ombudsman are reviewed, as are the respective duties and obligations of both the employer and the trustees of a pension scheme.

The course provides fantastic up-to-date content that should prove extremely useful to anyone who seeks to develop an understanding of the complex pensions landscape that exists in Ireland. Lectures are provided by people who deal with pensions on a daily basis and have a practical understanding of the issues being discussed.

*Stephen Gillick, Course Lecturer,  
Partner and Head of Pensions Team,  
Mason Hayes & Curran LLP*

The certificate will analyse the main pension scheme structures, such as defined contribution, defined benefit, personal pension plans and recent developments in the area including implementation of IORPs II, Master Trusts and auto-enrolment. The course will focus on the obligations of trustees, enabling them to fulfil their duties and will give insight into the handling of challenging issues such as underfunding, scheme wind-ups, pensions adjustment orders, taxation, mergers and acquisitions, and scheme restructuring.

### PROGRAMME OBJECTIVES

On completion of this training programme, participants will have:

- An excellent understanding of the key legal issues pertaining to current pensions law and practice and trusteeship in Ireland;
- A comprehensive understanding of pensions legislation and all relevant pensions regulatory bodies;
- A detailed knowledge and understanding of the obligations and duties of trustees under the *Pensions Act 1990* as amended, regulations and trust law principles;
- A thorough knowledge of the main pension scheme structures and what changes are expected to the pensions landscape in Ireland;
- Up to date information on the latest pensions developments in Ireland such as the IORP II Directive, Master Trusts, pension scheme consolidation and auto enrolment;
- Confidence in dealing with challenging issues such as pensions adjustment orders, taxation, mergers and acquisitions;
- A familiarity with recent case law and legislation which all have wide-ranging implications for trustees.



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### MODULES

**Module 1:** Legislation and regulatory framework

**Module 2:** The future of pensions in Ireland

**Module 3:** Pension scheme structures; pension adjustment orders; pensions in commercial transactions

**Module 4:** The role of trustees; employer obligations

**Module 5:** Taxation issues; winding up and restructuring of schemes; post-retirement issues; scheme governance

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### WHO SHOULD ATTEND?

This course is suitable for the following:

- Trustees, corporate pensions advisors, registered administrators, pension scheme custodians;
- Solicitors, barristers, legal executives and trainees;
- Those in pension and legal departments of insurance companies, banks and building societies;
- Actuaries, tax advisors, investment managers and pension consultants;
- Public service pensions professionals;
- Those working in representative bodies related to pensions and trusts; and
- Professionals seeking to work in the pensions industry and the financial services industry.

### FACULTY

Lecturers and tutors will be drawn from those with expertise in the field of pensions law and trusteeship. Previous lecturers have included the following:

- **Stephen Gillick**, Partner Mason Hayes and Curran
- **Liam Connellan**, Partner, Byrne Wallace
- **Kathleen Gormley BL**, The Pensions Authority
- **Sonya Dixon BL**
- **Aidan McLoughlin**, Solicitor, Director, ITC
- **Jane McKeever**, Consultant, William Fry
- **Ian Devlin**, Partner, William Fry
- **Deirdre Cummins**, of Counsel, Arthur Cox
- **Paul Kenny**, Former Pensions Ombudsman
- **Kirstie Flynn**, Solicitor, Director at Willis Towers Watson
- **Sarah Mc Cauge**, Partner, Arthur Cox
- **Ian Devlin**, Partner, Eversheds Sutherland
- **Muriel Walls**, Partner, Walls and Twomey
- **Conor Stokes**, Adjudication Officer, Workplace Relations Commission
- **Tom Mulcahy**, Employee Benefits Consultant, Aon
- **Patrick O Connor**, Senior Associate, Mason Hayes Curran
- **Orla Ormsby**, Head of Legal, Intermediary Division, Irish Life
- **Munro O'Dwyer**, Partner, Price Waterhouse Cooper
- **Aoife Sexton**, Chief Privacy Officer, Truata.

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