

# DIPLOMA CENTRE

## Certificate in Pensions and Applied Trusteeship



### MODULE 1: COURSE INTRODUCTION; LEGISLATIVE AND REGULATORY FRAMEWORK

SESSION 1	TIME	DELIVERY
Thursday 02 March 2023	6:00pm – 9:00pm	Onsite and Online
1	<b>Course Introduction:</b> <i>Geraldine Rafferty, Barrister, Course Leader, Law Society of Ireland</i>	
2	<b>The Financial Services and Pensions Ombudsman:</b> 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.	
3	<b>Overview of Pensions Law in Ireland:</b> pensions legislation, pensions regulatory bodies, registered administrators, internal dispute resolution.	
4	<b>The Pensions Authority:</b> A look at the structure and functions of the Pensions Authority. Supervisory and Enforcement Powers. Support for Trustees.	

3 hrs. Gen. CPD

SESSION 2	TIME	DELIVERY
Thursday 09 March 2023	2pm	Online Release
1	<b>Pensions Legislation: Legislative and Regulatory Framework</b> 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	
2.	<b>The role of the Workplace Relations Commission in Pensions.</b>	
3.	<b>The Data Protection Commission in the Context of Pensions</b>	
4.	<b>Data Protection:</b> Data Protection Act 2018; General Data Protection Regulations; Data Protection Commissioner.	

4hrs. Gen. CPD\*

### MODULE 2: THE FUTURE OF PENSIONS IN IRELAND

SESSION 3	TIME	DELIVERY
Thursday 16 March 2023		Online Release
1.	<b>Pension Adjustment Orders:</b> What is a pension adjustment order? Who are the trustees? The types of pension adjustment orders, pension splitting and pension advisors. Case studies.	
2.	<b>The Main Types of Pension Schemes:</b> Defined contribution; defined benefit; hybrid; personal pension plans; personal retirement savings accounts and s121 of the Pensions Act.	

2hrs. Gen CPD

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

SESSION 4	TIME	DELIVERY
Thursday 23 March 2023		Online Release

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- 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.
- 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.
- 3 **Future of Pension in Ireland Part 2:** examining the future of defined benefit schemes and auto enrolment.
- 4 **Public Sector Pensions:** An analysis of the different types of public sector pension schemes, retirement benefits, and reform in the area.

4 hrs. Gen. CPD\*

SESSION 5	TIME	DELIVERY
Thursday 30 March 2023	6:00pm – 8:30pm	Online

Workshop 1:

1.5hrs Gen. CPD & 1hr M&PD

### MODULE 4: THE ROLE OF TRUSTEES; EMPLOYER OBLIGATIONS

SESSION 6	TIME	DELIVERY
Thursday 20 April 2023	2pm	Online Release

- 1 **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.
- 2 **Pension Investment Issues:** A prudent look at the area of investment and pensions.
- 3 **Employer Obligations:** A review of the Pensions Act 1990 as it applies to employers
- 4 **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.

4hrs. Gen. CPD\*

SESSION 7	TIME	DELIVERY
Thursday 27 April 2023	6:00pm – 8:30pm	Online

Workshop 2:

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

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

SESSION 8	TIME	DELIVERY
Thursday 4 May 2023	2pm	Online Release

- 1 **Pension Scheme Governance:** How can trustees control the proper management and oversight of their pension scheme?
- 2 **Pensions and insolvency:** Security of Pension assets, recent case law, Personal Insolvency Act 2012.

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- Pensions litigation:** A look at the types of dispute that arise and the various methods of dispute resolution.
- Post retirement issues,** the changing state pension age and integration with the State pension.

4hrs Gen. CPD\*

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

SESSION 9	TIME	DELIVERY
Thursday 11 May 2023	2pm	Online Release
1	<b>Taxation Issues</b>	
2	<b>Winding-Up and Restructuring Pension Schemes:</b> 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.	
3	<b>Cross-border Pension Schemes:</b> The development of EU cross-border schemes.	

3 hrs. Gen. CPD\*

SESSION 10	TIME	DELIVERY
Thursday 18 May 2023	6:00pm – 8:00pm	Online
<b>Workshop 3:</b>		

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

### 2,500 WORD ASSIGNMENT DUE ON 30 June 2023

Please note that topics & dates may be subject to change. Draft timetable as of February 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](http://www.lawsociety.ie/diplomacentre)