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COURSE BROCHURE

# Pension Fund Change Leadership and Scheme Transition Training Course

27 September – 1 October 2027
Milan

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Registered in the United Kingdom and Saudi Arabia

# Pension Fund Change Leadership and Scheme Transition Training Course

**Ref:** 2686_102464 **Date:** 27 September – 1 October 2027 **Location:** Milan **Fees:** 6200 GBP

Pension Fund Change Leadership is a one-week training course for pension fund managers and scheme administrators who must steer a fund through a shift in benefit design, member servicing and structure, and leave with a scheme transition roadmap. Members now expect clear choices and online access, sponsors want predictable contributions, and small schemes are merging to stay viable. Jupiter Prime Training offers this course on pension fund change leadership.

## Why Pension Fund Change Leadership Matters Now

Three forces are reshaping retirement provision at once. Sponsoring employers are moving new joiners from promised-income plans into savings plans where the member carries investment outcome. Members, including younger savers, expect to see balances, change contributions and model retirement income from a phone. Boards of smaller funds are weighing mergers, shared administration and master trust arrangements to spread fixed costs. A fund that handles these shifts well keeps member trust and sponsor support; one that handles them poorly faces complaints, record errors and stalled decisions at board level.

## Who Gains Most from Pension Fund Change Leadership

- Scheme operations leads responsible for member records, contribution collection and benefit payments during a design change
- Member engagement owners who shape communications, retirement guidance and online self-service journeys
- Fund secretaries who prepare board papers, decision logs and trustee approvals for structural change
- Product and benefit design specialists who draft savings plan rules, default options and contribution scales
- Transformation leads who coordinate administrators, sponsors, record-keepers and outsourced providers

A fund executive team that sends its operations, engagement and secretariat leads together gains most, because each scheme transition decision touches all three.

## Pension Fund Change Leadership Capabilities

Participants practise the judgements that move a fund from one benefit design and operating model to the next without losing member confidence.

- Assess the readiness of member data, payroll interfaces and administration capacity for a closure of the promised-income section — the board decision on transition timing
- Design a default savings option with contribution scales and a retirement income path — member outcomes and sponsor cost certainty
- Specify an online member service journey covering balance view, contribution change and retirement modelling — member engagement and service cost
- Weigh merger, shared administration and pooled trust options against stated criteria — the board choice on consolidation
- Build a stakeholder map and communication sequence for members, sponsors, staff and trustees — acceptance of the change
- Test a transition plan against record, payment and complaint risks — continuity of member service

## Key Pension Fund Change Leadership Terms

- Defined benefit plan — a pension promise where retirement income is set by salary and service, with the sponsor bearing funding shortfalls.
- Defined contribution plan — a pension where contributions build an individual pot, and retirement income depends on contributions, returns and charges.
- Default option — the investment choice a member's savings enter automatically when they make no active selection.
- Scheme consolidation — combining several pension arrangements into one, through merger, transfer of members or shared administration.
- Member self-service — online access that lets savers view balances, update details and change contributions without staff help.
- Closure to future accrual — a decision that existing members stop building new promised benefits, while accrued rights remain protected.

## Pension Fund Change Leadership Day by Day

## Day 1: Forces Reshaping Retirement Provision

- Promised-Income Versus Savings Plan Design — Who Carries Retirement Outcome
- Longevity and Membership Profile Trends — Pressure on Benefit Design Choices
- Sponsor Cost Objectives and Contribution Policy — Employer Support for Change
- Member Expectation Survey Findings — Priorities for Service Redesign
- Fund Change Readiness Diagnostic — Starting Position for the Transition

## Day 2: Moving New Members into Savings Plans

- Closure to Future Accrual Options — Protecting Accrued Member Rights
- Default Savings Option Design — Outcomes for Members Who Never Choose
- Contribution Scales and Matching Rules — Balancing Adequacy and Sponsor Cost
- Retirement Income Path Choices — Drawdown, Annuity Purchase or Blend
- Member Record Cleansing Plan — Accurate Transfers Between Sections

## Day 3: Digital Services for Members

- Member Journey Mapping — Points Where Savers Abandon or Complain
- Online Balance and Contribution Change Tools — Reducing Manual Requests
- Retirement Income Modeller Requirements — Supporting Informed Member Choices
- Payroll and Record-Keeper Interface Checks — Clean Contribution Data Flows
- Service Level and Complaint Dashboard — Board Oversight of Member Experience

## Day 4: Consolidation and Operating Model Choices

- Merger, Transfer and Shared Administration Options — Scale Versus Control
- Consolidation Evaluation Criteria Matrix — Transparent Board Comparison
- Provider Due Diligence Questionnaire — Selecting Administration Partners
- Member Transfer Communication Pack — Trust During Structural Change
- Staff Role Redesign Plan — Retaining Skills Through the Transition

## Day 5: Leading the Scheme Transition in Practice

- Stakeholder Map for Members, Sponsors and Trustees — Sequencing Engagement
- Board Decision Paper on Transition Timing — Securing Trustee Approval
- Readiness Diagnostic Applied to Savings Plan Launch — Go or Delay Judgement
- Service Journey and Consolidation Choices Combined — One Coherent Roadmap
- Scheme Transition Roadmap Completion — Milestones, Owners and Member Messages

## Applying Pension Fund Change Leadership After the Course

- Run the fund change readiness diagnostic with operations and record-keeping colleagues and present the gaps to the executive team.
- Map one member journey, such as contribution change or retirement quote, and agree two online service fixes with the administrator.

## Pension Fund Change Leadership Questions FAQ

### What is pension fund change leadership and why does it matter now?

Pension fund change leadership is the work of steering a fund through new benefit design, member services and structure. It matters now because sponsors favour savings plans, members expect online access and smaller funds are consolidating.

### Which roles gain most from pension fund change leadership skills?

Scheme operations leads, member engagement owners, fund secretaries, benefit design specialists and transformation leads gain most. Each of them carries part of a transition, and their decisions must line up for members to experience one coherent change.

## How does pension fund change leadership differ from a pension investment course?

Pension fund change leadership focuses on benefit design, member services, consolidation and people, not on asset strategy or valuation of obligations. You work on how the fund operates and communicates, rather than how its assets are invested.

## What do you bring back from pension fund change leadership training?

You bring back a scheme transition roadmap with milestones, owners and member messages. It draws on a readiness diagnostic, a default savings option outline, an online service journey and a consolidation comparison prepared during the one week.

## Pension Fund Change Leadership: The Way Forward

The scheme transition roadmap first informs the board decision on when to close the promised-income section to new joiners. Fund executives, administrators and trustees use it to sequence member messages and provider work. After its first use, the consolidation comparison deserves a fresh look, because member numbers, costs and provider offers move as the savings plan grows.