Training course on Defined Benefit (DB) Plan Management and De-risking

Professional Development Training Course Outline

Category	Pension and Retirement	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

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Programme Curriculum

Training Course on Defined Benefit (DB) Plan Management and De-risking

Introduction

Training Course on Defined Benefit (DB) Plan Management and De-risking is designed to equip participants with essential knowledge and practical skills to effectively manage and de-risk defined benefit pension plans. As organizations face increasing pressure from regulatory changes, market volatility, and demographic shifts, the need for robust DB plan management strategies has never been more critical. This course addresses the complexities of DB plan funding, investment strategies, and risk management practices that can significantly enhance the sustainability and security of pension benefits for retirees.

Throughout this course, attendees will explore key topics such as plan design, liability valuation, funding strategies, and de-risking techniques. The curriculum combines theoretical insights with practical applications, featuring case studies and interactive discussions that engage participants in real-world scenarios. By the end of the training, attendees will have a comprehensive understanding of how to develop and implement effective management and de-risking strategies for DB plans. Additionally, the course will address potential challenges, such as interest rate fluctuations, longevity risk, and regulatory compliance, ensuring participants are prepared to navigate the complexities of DB pension management successfully.

Course Objectives

1. Understand the fundamentals of defined benefit plan management.
2. Analyze the components and design of DB pension plans.
3. Explore funding strategies for DB plans.
4. Evaluate liability valuation methods and their implications.
5. Assess investment strategies for DB plan portfolios.
6. Communicate effectively about DB plan concepts.
7. Identify challenges and solutions in DB plan management.
8. Conduct feasibility studies for de-risking strategies.
9. Understand the role of longevity risk in DB plans.
10. Explore case studies of successful DB plan management.
11. Foster collaboration among stakeholders in pension management.
12. Create action plans for implementing de-risking strategies.
13. Stay informed about changes in pension regulations and policies.

Target Audience

1. Pension fund managers
2. HR professionals managing pension plans
3. Financial analysts
4. Actuaries
5. Compliance officers
6. Graduate students in finance or actuarial science
7. Consultants in pension management
8. Corporate finance professionals

Course Duration: 5 Days

Course Modules

Module 1: Introduction to Defined Benefit Plans

- Overview of defined benefit pension plans and their significance.
- Key terminology related to DB plan management.
- Understanding the regulatory framework governing DB plans.
- Discussion of common misconceptions about defined benefit plans.
- Case studies on effective DB plan management.

Module 2: Design and Structure of DB Plans

- Analyzing different types of DB plan designs (final average pay, career average).
- Evaluating the pros and cons of various DB structures.
- Understanding benefit accrual methods and their implications.
- Strategies for aligning plan design with organizational objectives.
- Case studies on innovative DB plan design.

Module 3: Funding Strategies for DB Plans

- Overview of funding requirements and actuarial valuations.
- Analyzing funding methods (entry age normal, projected unit credit).
- Evaluating the role of employer contributions and employee participation.
- Strategies for managing cash flows and funding shortfalls.

- Case studies on successful funding strategies.

Module 4: Liability Valuation and Risk Assessment

- Understanding the principles of liability valuation for DB plans.
- Evaluating different valuation methods (market value vs. actuarial value).
- Analyzing the impact of interest rates on pension liabilities.
- Techniques for assessing and managing risks associated with DB plans.
- Case studies on liability management.

Module 5: Investment Strategies for DB Plans

- Overview of investment options for DB plan portfolios.
- Analyzing asset allocation strategies and diversification.
- Evaluating the role of alternative investments in DB plans.
- Strategies for balancing risk and return in investment decisions.
- Case studies on successful investment strategies.

Module 6: De-risking Strategies for DB Plans

- Understanding the concept of de-risking and its importance.
- Evaluating techniques for de-risking (buyouts, buy-ins, and annuitization).
- Analyzing the benefits and drawbacks of various de-risking strategies.
- Case studies on successful de-risking initiatives.
- Strategies for implementing a de-risking plan.

Module 7: Regulatory Compliance and Reporting

- Overview of regulatory requirements affecting DB plans.
- Understanding the importance of compliance in pension management.
- Analyzing reporting obligations for DB plans.
- Strategies for ensuring transparency and accountability.
- Case studies on compliance challenges in DB plan management.

Module 8: Future Trends in DB Plan Management

- Exploring emerging trends in defined benefit plan management.
- The impact of demographic changes on DB plans.
- Innovations in technology and data analytics for pension management.
- Discussion of sustainability and environmental considerations in DB plans.
- Case studies on future-ready DB plan strategies.

Training Methodology

- **Interactive Workshops:** Facilitated discussions, group exercises, and problem-solving activities.
- **Case Studies:** Real-world examples to illustrate successful community-based surveillance practices.
- **Role-Playing and Simulations:** Practice engaging communities in surveillance activities.
- **Expert Presentations:** Insights from experienced public health professionals and community leaders.
- **Group Projects:** Collaborative development of community surveillance plans.
- **Action Planning:** Development of personalized action plans for implementing community-based surveillance.
- **Digital Tools and Resources:** Utilization of online platforms for collaboration and learning.

- **Peer-to-Peer Learning:** Sharing experiences and insights on community engagement.
- **Post-Training Support:** Access to online forums, mentorship, and continued learning resources.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

- Participants must be conversant in English.
- Upon completion of training, participants will receive an Authorized Training Certificate.
- The course duration is flexible and can be modified to fit any number of days.
- Course fee includes facilitation, training materials, 2 coffee breaks, buffet lunch, and a Certificate upon successful completion.
- One-year post-training support, consultation, and coaching provided after the course.
- Payment should be made at least a week before the training commencement to Fineskill Training Center account, as indicated in the invoice, to enable better preparation.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

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