

# RFIN TRUSTEE TRAINING

**30 NOVEMBER 2023**

Minimum requirements for Funds  
Governance Policies



**OUR** RETIREMENT  
RESPONSIBILITY

## OVERVIEW:

In this session we investigate the policies Boards of Trustees need to effectively govern the Funds.

We unpack some of the critical policies in terms of good corporate governance and best practice based on the King Reports published over the years and the NamCode on Corporate Governance, while considering the entities and the obligations of the entities.

We look at avoidance of abdicating responsibilities from the Board of Trustees to a service provider on the backdrop of the outsourcing standard published and underlying principles which form the basis of good governance practice and how the policies of the Board of Trustees can assist in this regard to ensure consistent and objective management of the Funds.

## KEY LEARNING OUTCOMES:

- ◆ Fund policies and the methods of governance
- ◆ RFIN Governance guidelines
- ◆ Policy management and updating
- ◆ Prohibition of abdicating responsibilities entrusted to the Board of Trustees through service level agreements or otherwise.
- ◆ Dealing with complaints in the matters of governance

## WHO SHOULD ATTEND:

- ◆ Pension and provident fund Trustees
- ◆ Preservation Fund Trustees
- ◆ Principal Officers
- ◆ New Trustees
- ◆ Seasoned Trustees who want to refresh their memory
- ◆ Custodians of Pension Fund Benefits
- ◆ Employee Benefit service providers
- ◆ Benefit Consultants
- ◆ Brokers in the retirement fund space
- ◆ Umbrella Fund Participating Employers
- ◆ Stand alone, Privately administered fund Board of Trustees
- ◆ Administration teams

FOR MORE INFORMATION PLEASE CONTACT

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