



# Pension Schemes. Simplified.

## About MyCSP

Training@MyCSP is an established team of pension professionals with expertise in all aspects of pension administration, process design and project management, built on a wide range of experience across public and private sector schemes.

We help employers to understand and meet their pension scheme obligations through training, consultancy and support. We specialise in informative and interactive sessions for employers and members which simplify the complex world of pensions.

Through the MyCSP Training and Employee Engagement Service, we offer training on a wide range of pension related topics and legislative change.

Employer sessions provide employers with the information they need in order to meet their scheme obligations. We can run sessions for every pensions occasion; covering pension scheme rules, roles and responsibilities for Defined Benefit and Defined Contribution schemes and auto-enrolment. We deliver in a classroom environment or one-on-one, with specifically developed training materials.

Member education is designed to guide members through their pension scheme and the available options. These sessions can be run directly at employer premises. We also hold open courses where individual delegates can attend.

## Pre-retirement awareness – planning your 25 year holiday

**Duration 3 hours (approx.)**

**The pre-retirement engagement sessions provide members with information to aid their retirement decisions and help them understand the retirement process.**

### Who should attend?

These seminars are tailored for members who are within five to ten years of retirement age / intended retirement. The session uses interactive exercises designed to aid members in retirement decision making.

### Course content:

- What happens to a pension when a member decides to draw it?
- Forms and communications received on drawing benefits
- Benefits explained
- Different types of retirement
- Topping up benefits on leaving
- Family benefits

### Benefits from attending:

Members attending these seminars will be more informed about their pension and the options available to them. They will also be able to estimate their pension benefits which will enable them to make informed choices regarding their financial position when they retire.

### What do attendees think of our pre-retirement sessions?

“Covered everything I was unsure of and more”

“I learned so much – I thought I knew a fair bit about pensions but I am leaving feeling much better informed”

“Comprehensive course and a very knowledgeable presenter”

“Delivered training on a dry subject in a very impressive and entertaining way”

# Mid-life planning – checking you're still on track

Duration 3 hours (approx.)

When people reach retirement age they often regret not finding out more about their pension earlier.

Our mid-life planning sessions help educate members in the areas they may have dismissed as less important earlier in their careers, but wish they knew more about when they reach retirement age.

## Who should attend?

Ideally aimed at those mid-way through their careers who'd like to take control of their retirement planning. #NEVERTOOEARLY

## Course Content:

- How your pension scheme works
- Forewarned is forearmed
- How your benefits are calculated
- How to get more from your pension
- Retirement age and the options available
- Providing for your family
- Where you can find further information

## Benefits from attending:

- Gain a better understanding of how your pension scheme works
- Understand how your pension is calculated
- Understand the options available to boost your pension
- Understand the options available at retirement age

## What do attendees think of our mid-life planning sessions?

'It has stimulated my initial thoughts to retirement and to undertake checks'

'Really well presented and structured on a dry subject area'

'Very informative – lots of food for thought'

'I got a better understanding of the pension scheme I am in and the options available to me'

# Introducing your pension – have you met?

Duration 3.5 hours (approx.)

This session aims to provide members with information about the scheme benefits, additional benefits, family cover and what happens upon leaving the scheme.

## Who should attend?

Aimed at new joiners and those who need an introduction to pensions.

## Course content:

- How your pension scheme works
- Contributions payable
- Benefits upon leaving
- Family benefits
- Boosting benefits
- Where to find further information

## Benefits from attending:

Attendees will:

- Gain an understanding of the benefits available in their scheme
- Understand the value of the pension benefits and total benefits
- Be able to calculate their pension benefits
- Be able to understand their benefit statements

## What do attendees think of our pension introduction sessions?

'Covered everything in depth in an excellent, informative way'

'Very thorough, cleared up a lot of the mystery'

'Answered all queries fully and gave real life examples that were relatable'

'Lots of relevant information given clearly'

## Course feedback

**Have attended a retirement course in the past but not as comprehensive as this**

**Nicely balanced, informative and dare I say it occasionally entertaining**

**Clear engaging presentation**

**Very clearly presented – kept our attention well. Could answer all questions – hugely knowledgeable and a nice touch of humour**

**Extremely knowledgeable, great presentation style, helpful, open – just excellent!**

**Subjects covered well – questions welcomed and complex subjects covered to a suitable level**

## Why use us?

- 76% of members would like financial education from their employer
- Members are unsure of retirement plans and the impact of the increase in State Pension Age
- Employer responsibilities in respect of pension schemes are becoming increasingly complex
- Would you or your members benefit from some support, education or guidance?

## TRAINING@myCSP

We understand the world of pensions can be complicated; we make it simple for trustees, scheme managers, employers and members alike. We measure our success by our clients' satisfaction and we've been delighted to receive positive testimony from employers and members.

- We are the leading provider of Civil Service Pensions employer training and member engagement. Our training and support services have gone from strength to strength since 2012 through the high quality delivery and number of satisfied delegates;
- In 2016 we ran over 500 courses in 50 locations catering for 20,000 attendees;
- 89% of our attendees felt our courses were very valuable and excellent;
- We provide training and guidance services to the Civil Service, NHS, Local Government, police and many private sector arrangements.

TRAINING@myCSP

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