



SHORT COURSE ON
Pension Scheme Trustee
Investment Training



KEY INFORMATION



Monday to Thursday
08h30 - 12h30



**Certificate of
Completion**



In-house and Online



**In-house: Additional fee for
venue hire, boarding and travel
for trainer by arrangement**



**Maximum 6
Delegates Online**



**Maximum 12
Delegates In-House**



**R18,400 p.p. /
\$1,155 p.p. online (no. VAT)**



Pension fund trustees balance the demands of growth and risk. This course builds the understanding needed to assess investment options and make sound, responsible decisions.

The training ensures that trustees are well informed about the financial decisions they participate in making and learn what they need to know.

The programme develops practical skills in defining fund strategy, managing portfolios, and applying financial tools to strengthen investment oversight and trustee decision-making.



What you'll cover in this course



Learn the Language of Finance

Become comfortable with the financial terms and concepts necessary to make informed decisions based on financial statements.



Clarify Fund Investment Strategy

Learn how to define your specific objectives, assess risk profiles, and select strategies and asset classes that align with your time horizons and fund requirements.



Review and Manage Pension Portfolios

Explore diversification growth, inflation, and crisis management to strengthen fund oversight.



Evaluate Investment Options

Understand vehicles, rewards, and risks while practising performance measurement and ratio analysis to make informed decisions.

What types of delegates usually take this course?



Pension fund trustees who want to improve their understanding of financial statements, ratios, and investment terminology.



New or prospective trustees seeking clarity on how to monitor the fund investments.



Board members and committee members involved in pension or retirement fund oversight.



HR, compliance, or governance professionals who support trustees and need a working knowledge of investment principles.



Organisations wanting to strengthen the capacity and confidence of their trustee boards through structured financial training.

COURSE OUTLINE: MODULE ONE

Day 1

The Language of Finance

Develop understanding of core financial terms and business flows

- Funding sources and how money moves through a business
- Understanding assets and working capital
- Reading and interpreting financial flows and balances
- Building a complete “financial toolbox”
- Practical exercises linking concepts to real examples

Day 2

Profit and Cash Flow

Explore how profits are created and cash is managed

- Identify fixed and variable expenses
- Analyse the income statement to measure profit
- Apply the matching rule to financial timing
- Relate profit to cash flow through guided exercises
- Perform profit and cash flow calculations

Day 3

The Balance Sheet and Ratios

Connect assets, liabilities, and performance through ratio analysis

- Construct and interpret balance sheets
- Calculate and understand closing balances
- Complete linked exercises from previous sessions
- Analyse balance sheet results for insight
- Use ratios to assess business performance

Day 4

Fund Investment Strategy

Define, structure, and evaluate a sustainable fund investment approach

- Clarify fund objectives and time horizons
- Assess cash flow, supply, and demand dynamics
- Establish risk profiles and fund types
- Select strategy and asset allocation frameworks
- Apply performance ratios and crisis management tools

How you could benefit from this course

Improve your understanding of financial statements, ratios, and the terminology used in pension fund reporting.

Build confidence in assessing fund objectives, risk profiles, and strategy choices.

Strengthen your knowledge of investment vehicles, performance measures, and the cautions that come with them.

This training course is designed specifically for trustees. We deliver the material at a pace that suits them, using clear, accessible language. The course provides a practical and thoughtful overview of the financial and investment responsibilities involved in overseeing a pension fund. Trustees will leave feeling confident to ask informed questions and to ensure the fund is managed safely and effectively.

Learn practical approaches to portfolio oversight, including diversification and crisis management.

Walk away with greater clarity about your oversight of the investment portfolio as a trustee and have the tools to make your voice heard.

Gain the confidence to question and interpret advice from fund managers and consultants.

MEET THE TRAINER



John Mitchell

John has been a lead trainer at JSF for 26 years, guiding hundreds of students to not only feel more confident with finance – but to be genuinely competent. Known for his warmth, patience, and knack for turning financial fog into clarity, John's impact runs deeper than spreadsheets: his students leave his courses empowered, equipped, and often wondering why finance ever seemed intimidating in the first place.

He's taken this approach across borders, delivering courses everywhere from South Africa to Eswatini to Saudi Arabia – and 14 other countries in Africa and the Middle East. Whether online or in the classroom, John's sessions are practical, energising, and often anchored by his signature “Business Game,” which makes finance feel real, relevant – and yes, even fun.

John's career began at Gold Fields Mining and Development, where he held diverse roles in HR, procurement, and management. He's also served as Director (now Owner and Director) of the School of Finance, and holds a B.A. in Philosophy from UCT with studies in economics, law, maths, and more.

About the Johannesburg School of Finance



We are a small training company that has been making business finance accessible, practical, and personal since 1998.

Based in South Africa, our work is rooted in a clear vision: to play a part in reducing income inequality. We provide people with the knowledge and confidence to understand and engage with the financial side of business—whether they're running a company, managing a team, or simply trying to make better financial decisions in their own lives.

Our training goes beyond the numbers. We combine real-world business finance skills with thoughtful guidance on business practice, offering a well-rounded learning experience that is as empowering as it is practical. Whether working with individuals, teams, or organizations, we believe financial understanding should be a tool for growth, not a barrier to entry.

Trusted by:



Unsure where to start? Just ask.

We're happy to chat and see how we might be able to help.
We respond within one business day, and if our courses aren't quite what you're looking for, we'll do our best to point you in the right direction.

Phone or WhatsApp

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