

Kathy Trusler

Scheme Manager



Kathy co-ordinates all day-to-day activities for a range of trustee secretary appointments and supports our team of independent trustees.

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Background & experience

Kathy began her career in 1984 in pension scheme administration working for British Shipbuilders in-house pensions department. She moved to Aon Hewitt where she held a number of senior roles, most latterly encompassing financial and operational responsibility for three administration teams.

Kathy joined us in 2013 and her role covers all aspects of managing defined benefit (DB) and defined contribution (DC) pension schemes. Working as part of the wider pension secretariat team, she supports our trustee secretaries on large appointments.

Kathy played a key role in implementing our assurance reporting framework to achieve AAF 02/07 accreditation.

As well as surviving 30 years in pensions, Kathy also made it to the end of a zip line through a rain forest despite her fear of heights!

Qualifications: PMI Qualification in Pensions Administration & Retirement Provision Certificate

Specialisms

trustee secretarial support • scheme administration
governance support • member communications

Example projects

Adviser review Providing expert insight to the trustees during an administrator review, managing the tender process and overseeing the transition to a new provider.

Effective communications Drafting scheme closure communications and reassuring members, whilst also managing a major data cleanse project for the same client.

Scheme sectionalisation Supporting a large utilities company through a fast moving, complex project to sectionalise the pension scheme, co-ordinating committee meetings, producing actions logs and drafting minutes within very tight deadlines.

Example clients

	Assets	Members
Client A (DB)	£148m	1,425
Client B (DC)	£59m	5,785
Client C (hybrid)	£228m	3,865