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Why the way we talk about the
role of the Trustee matters

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THE WAY WE TALK ABOUT THINGS MATTERS



**I'M HAVING A PARTY ON SATURDAY
AND IT'D BE GREAT IF YOU WERE THERE.**

**IT STARTS AT 8 AND THERE'LL BE
ABOUT 50 PEOPLE, WHO I THINK
YOU'LL FIND INTERESTING.**

**I'LL PUT SOME MONEY BEHIND THE
BAR BUT BRING A BOTTLE TOO.**

THERE'S A GATHERING ON SATURDAY.

WHOEVER WANTS TO COME CAN.

**IT STARTS AT 8 SO YOU'LL
PROBABLY BE TIRED THE NEXT DAY.**

**THERE'LL BE ABOUT 50 PEOPLE SO BE
PREPARED FOR IT TO BE CROWDED. IN FACT,
IT MAY BE QUITE STRESSFUL FOR YOU.**

IT'S A CASH BAR.

You're Invited
(not really)

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SOME LANGUAGE DOS AND DON'TS

FORMAL TONE

‘I am therefore writing to all eligible pensioners with regards to the vacancy’

‘safeguard the assets of the Scheme for the beneficiaries’

‘On receipt of your application form...’

INFORMAL, CONVERSATIONAL TONE

‘Would you like to help run the pension scheme?’

‘Trustees look after members’ benefits in the scheme’

‘We’d like you to send us...’

USES PASSIVE VOICE

‘Applications are sought from...’

‘It is hoped that the successful candidates will reflect the diversity of membership’

‘Training will be provided...’

SENTENCES ARE ‘ACTIVE’ AND HAVE WORDS LIKE ‘WE’, ‘OUR’ AND ‘US’

‘We’re looking for members to join the Trustee Board’

‘We’re keen to get people with a range of perspectives, experience and knowledge involved, because we believe it will make our Trustee Board stronger.’

‘You’ll attend a training day – run by the scheme’s advisers’

DOESN'T ADDRESS YOU PERSONALLY

'Trustee Directors are responsible for the overall management of the Group Fund'

'Nominations must be signed by the nominee'

'They are people with a strong sense of personal commitment'

USES PRONOUNS LIKE 'YOU' AND 'YOUR'

'As a trustee, you would...'

'You should get four members of the scheme who support your application to complete this part of the form.'

'If you're trustworthy, responsible, fair and open-minded, you'll make a good Trustee.'

LONG AND CONVOLUTED SENTENCES

‘The term of office of the current member nominated Trustee Directors of the Group Pension Fund will expire shortly and I am pleased to confirm that the Trustee Board has now put in place arrangements for the selection and appointment of new Member Nominated Trustee Directors in 2013, with the appointments being effective from the conclusion of the March 2014 Trustee Board meeting.’

SHORT SENTENCES THAT ARE EASY TO UNDERSTAND

‘We’re looking for two people like you to join the Trustee Board. You’d become a Member-nominated Director (MND). This means you’d help make decisions about the running of the pension scheme.’

**EMPHASISES RESPONSIBILITY
AND BURDEN**

‘Trustee Directors face a high level of personal responsibility’

‘Trustees are responsible for something that matters hugely’

‘...no small task!’

**EMPHASISES COLLABORATION
AND REWARD**

‘Together, trustees are responsible for managing the pension scheme’

‘You’d help make decisions about the running of the pension scheme’

‘Being an MND means you can represent the views of other members like you’

EMPHASISES EXPERTISE AND EXPERIENCE

‘Trustees must be able to understand large amounts of important and often challenging legal and investment documentation’

‘You should preferably have previous experience of working as part of a decision making group’

EMPHASISES PERSONAL CHARACTERISTICS

‘The most important quality is that you are willing to learn...’

‘A good MND is:

- Honest and impartial
- Comfortable asking questions
- Able to make strategic decisions’

ONE MORE 'DON'T'...

Military metaphors

- ▶ 'serve for a term'
- ▶ 'briefing session'
- ▶ 'reserve list'
- ▶ 'appointed'
- ▶ 'discharge their duties'

**PENSIONS AND
LIFETIME SAVINGS
ASSOCIATION**

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