



Pivot

A S S E T S

TRAINING, INVESTMENTS & CONSULTANCY

**2025 CORPORATE
TRAINING CALENDAR**

ABOUT PIVOT

Pivot Assets has assisted several institutions in capacity building and consulting on a wide range of services over the years. It was established in 2019 to enhance learning through various areas of training, best practices, and raising knowledge about the investing field.

Pivot has made significant advances in the fields of pension (investment) consulting and capacity building for corporations and other institutions. We believe that each client is unique, and we strive to understand those needs in order to provide tailored solutions. We are able to design and deliver unique and personalized solutions since we have a large number of seasoned expert consultants from diverse sectors.

VISION

To be the premier facilitators of Funds services in Africa.

STATEMENT OF PURPOSE

A prosperous Africa Inspired by dignity.

MISSION

To develop and deliver innovative solutions through capacity building, consultancy and investment advisory services, setting the standard for excellence and accessibility in retirement planning and support.

CORE VALUES

Integrity, excellence, Client Focus, Innovation & Creativity and Team Work

UNIQUE VALUE PROPOSITION (UVP)

We provide supporting services to funds in order to improve service delivery to beneficiaries, thereby improving quality of life



WORD FROM THE CEO

We take great pride in the strong relationships we have built with our clients and value the trust they place in us. Your support and business are integral to our success and we are deeply grateful for the partnership. We are committed to nurturing and strengthening these relationships for years to come.

As we look ahead to 2025 we are excited to share a lineup of engaging local and international programs. We encourage you to mark your calendar and also invite you to reach out for customized training solutions tailored to your organization specific needs. Our team is dedicated to supporting your growth and success by providing training programs that align with your strategic objectives

Thank you for being an essential part of our journey!



Joshua Okeyo, CIPM
CEO

2025 PIVOT ASSETS TRAINING CALENDAR

	Program Type	Program	Date	Venue	Cost
January	International Program	International RBS Effective Strategy	20 th –24 th Jan 2025	Dubai	USD 1,500
	National Program	Retirement Benefit Schemes Technology and Risk Strategy	27 th –31 st Jan 2025	Machakos	75,000
	Webinar	Resolutions 2025: Personal Financial Reinvention	4 th Feb 2025	online	Free
February	National Program	Pension Leadership & Practical Ethics and Compliance seminar	17 th –21 st Feb 2025	Naivasha	75,000
	Corporate Programs	Corporate payroll and Statutory compliance	10 th –14 th Feb 2025	Nakuru	65,500
March	National Program	Scheme Management Accounting and Financial Strategy workshop	17 th –21 st Mar 2025	Mombasa	75,000
	Corporate Programs	Business–Investor Readiness Program	12 th –13 th Mar 2025	Nairobi	20,000
	Webinar	Personal Financial Reinvention 2	25 th Mar 2025	online	Free
	National Program	Retirement Readiness and Financial Planning for Executives	24 th –28 th Mar 2025	Naivasha	65,500
April	National Program	Practical Pension Administration and Communication Strategy	7 th –11 th April 2025	Mombasa	75,000
	National Program	Masterclass in RBS Accounting and Taxation	7 th –11 th April 2025	Mombasa	75,000
May	National Program	Boards Effectiveness and Leadership Summit	19 th –23 rd May 2025	Kisumu	75,000
	International Program	Impact Investment and global Pension strategy	26 th –30 th May 2025	Amsterdam	USD 2,800
June	National Program	Pension and Data Protection Laws	23 rd –27 th June 2025	Nakuru	75,000
	Webinar	Mid–Year Review–Personal Financial Reinvention	24 th June 2025	online	Free
July	International Program	Global Benchmarking on ESG and Investment Strategy	21 st –25 th July 2025	London	USD 3,000
	National Program	ESG, Impact Investments and Technology Strategy	21 st –25 th July 2025	Mombasa	75,000
August	National Program	4 th Retirement Benefits Conference	25 th –29 th Aug 2025	Mombasa	75,000
	Corporate Programs	Industrial and Workplace Relations Summit	11 th –15 th Aug 2025	Nakuru	65,500
September	International Program	Global pension Leadership Strategy	22 nd –26 th Sept 2025	Amsterdam	USD 2,800
	National Program	Audit, Compliance and Risk Workshop	22 nd –26 th Sept 2025	Naivasha	75,000
	Webinar	Progress Review–Personal Financial Reinvention	23 rd Sept 2025	online	Free
October	National Program	Masterclass in Investment Performance Measurement and Reporting	13 th –17 th Oct 2025	Mombasa	75,000
	National Program	Corporate Governance and Practical Leadership Summit	27 th –31 st Oct 2025	Nakuru	75,000
	Webinar	Entrepreneurship and Fundraising	25 th Oct 2025	online	Free
November	International Program	Transformative Leadership for Managing Private and Public Institution	24 th –28 th Nov 2025	Cape Town	USD 2,800
	National Program	Fundamentals of Pension Leadership & Emerging Issues	24 th –28 th Nov 2025	Kisumu	75,000
December	National Program	PE, Venture capital and Infrastructure investments for RBS	15 th –19 th Dec 2025	Mombasa	75,000
	Webinar	Progress Review–Personal Financial Reinvention	16 th Dec 2025	online	Free

Public Sector Programs

	Date	Venue	cost
Enterprise Risk Management	Kisumu	Mar–25	75,000
Public sector Financial Reporting	Mombasa	Apr–25	75,000
PFM and Budgeting	Mombasa	May–25	75,000
County Assembly Oversight	Nakuru	Jul–25	75,000
Law Making and Legislative Process	Mombasa	Aug–25	75,000
TVET Financial Reporting	Kisumu	Sep–25	75,000

Corporate Programs

	Date	Venue	cost
Corporate payroll and Statutory compliance	Feb-25	Nakuru	75,000.00
HR Metrics and Dash boarding	Mar-25	Kisumu	75,000.00
Industrial and Workplace Relations Summit	Apr-25	Mombasa	75,000.00
Corporate Counsel and compliance officers congress	May-25	Naivasha	75,000.00
Combating Money Laundering	Jun-25	Nairobi	75,000.00
Cybersecurity Awareness for Administrative Assistants	Jul-25	Naivasha	75,000.00
Excellent customer care for Health Sector	Aug-25	Nairobi	75,000.00
Excellent customer care for Frontline Staff	Sep-25	Nairobi	75,000.00
Proposal writing and Resource Mobilization	Oct-25	Nairobi	35,000.00

OTHER TRAININGS AND CONSULTANCY AREAS

- Strategic plan development and review
- Preparation of IPS
- Board Evaluations
- Development Policies for Pension schemes;
- Trust Deeds and rules
- Member Education
- Personal Financial management
- Job separation training
- Retirement readiness the transition management training
- Wealth creation
- Corporate governance

CONSULTANCIES:

Consultancy/Advisory and Strategy

Asset manager selection, Mandate optimization, investment policy statement review, back office operation services, board evaluation services, Investment technology support, GIPS verification and firm assistance to compliance.

Investment Analytics

Asset allocation, investment evaluation, investment performance checks, Risk and performance monitoring, Historic performance analysis, Independent valuation of unlisted investments, Business modelling and risk analysis, Quarterly valuation reporting support, Fund accounting services for institutional clients, customized indices and independent mandate compliance monitoring.

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