

Social Economy and Mutualism

2021/2022

Objectives

- Provide specialized training that contributes to participants' furthering their skills and professional qualifications.
- Describe the social economy sector in Portugal, focusing on mutualism and mutualistic organizations.
- Provide participants with knowledge on legal, financial, tax, accounting, auditing and supervisory provisions and tools on mutualistic organizations.

The program will be taught online, using Zoom

Who should attend

- Members or candidates to governing bodies in mutualistic organizations.
- Officers in mutualistic organizations responsible for their governance.

Information



215 800 952

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Structure

The Specialization Program in Social Economy and Mutualism organized by Autónoma Academy was a proposal submitted by Montepio Geral – Associação Mutualista (a mutualistic organization) and aims to the lack of training in this field.

The program aims to meet the requirements for professional qualifications and provide knowledge on how mutualistic organizations are run, the risks they may be exposed to, as well as the legal provisions and regulations in force and which can be applied to mutualistic organizations, namely the legal code on mutualistic organizations (Decree-Law n. ° 59/2018, dated 02 August).

The program has been designed to include the key information required to directors and higher officials in mutualistic organizations, in particular, information on the specific supervisory regime, under the authority of Autoridade de Supervisão de Seguros e Fundos de Pensões.

The program is lectured by a highly qualified academic staff who are both scholars and experienced professionals. A multidisciplinary approach is used, and focus is given to governance and the legal and financial regimes for mutualistic organizations.

Coordination: Luís Antero Reto, PhD

Duration

07 September 2021

TIMETABLE

Tuesdays 15h00 – 18h00

Wednesdays 15h00 – 18h00

Tuesdays 15h00 – 18h00

WORKLOAD

30 hours

Study Plan

> Modules

Module 1 – Social Economy

- Introduction to social economy
- Social economy in Portugal
- Introduction to mutualism
- Mutualism in Portugal and in Europe

Luís Antero Reto, PhD

6 hours

Module 2 – Legal regime of social economy and of mutualistic organizations

- The legal and constitutional framework of social economy
- The legal regime of mutualistic organizations

Deolinda Meira, PhD – ISCAP

6 hours

Module 3 – The financial and accounting regime of mutualistic organizations

- The financial regime of mutualistic organizations
- Accounting system and accounting in mutualistic organizations

Helena Canha, PhD – ISCAP

6 hours

Module 4 – Taxation and audit in mutualistic organizations

- Taxation in mutualistic organizations
- Audit in mutualistic organizations

Fátima Geada, PhD – UAL e IPAI

6 hours

Module 5 – Governance, supervision, authority and reporting duties of mutualistic organizations

- Governance, partnerships, affiliated companies, and group relations
- Supervision, authority and reporting duties

José Almaça, PhD – UAL

6 hours