



The-Pensions-Net-Work

“Leading Thought In The Employee Benefits Market”

10th & 11th September 2015

Audleys Wood Hotel, Alton Road, Basingstoke, Hampshire RG25 2JT

Agenda for Themed Meeting

“Pensions freedom & choice –so far so good?”

Thursday 10th

- 13:00 Lunch
- 14:00 Tea/Coffee
- 14:30 Welcome – John Moret, Chairman
- 14:35 **“An Independent Perspective On Progress To Date”**
- Niki Cleal, Independent Consultant
- Discussion
- 15:15 **Session 1 – “The Guidance Guarantee – What’s Gone Well - & Not So Well”**
(15 minutes each speaker)
- Michelle Cracknell, Chief Executive – The Pensions Advisory Service
 - Alan Davies, Senior Service Delivery & Contract Manager – Pension Wise – Citizens Advice Bureau
 - John Lawson, Head of Policy, Retirement Solutions – Aviva
 - Tim Gosling, DC Policy Lead – National Association of Pension Funds
- Discussion (30 mins)
- 16:45 Tea/Coffee
- 17:15 **Session 2 – “The Investment Dilemma”**
(20 minutes each speaker)
- Tim Banks, Managing Director, Pensions Strategies Group – Alliance Bernstein
 - Emma Douglas, Head of DC Solutions – Legal & General Investment Management
 - Robert Reid, Managing Director - Syndaxi
 - Nils Johnson, Director - Spence Johnson
- Discussion (25 mins)
- 19:00 Drinks
- 19:30 Dinner

After Dinner - “Beyond Pensions”

- Michael Johnson, Research Fellow – Centre for Policy Studies

Friday 11th

- 08:15 Tea/Coffee
- 08:30 Introduction by John Moret
- 08:35 **“Bespoke Retirement Solutions –An Independent Perspective”**
- Colette Dunn, Head of Strategy - Milliman
- Discussion
- 09:30 **Session 3 – “Redefining Advice And Its Delivery”**
(15 minutes each speaker)
- Alan Higham, Independent Retirement Commentator – PensionsChamp
 - Abraham Okusanya, Principal – FinalytiQ
 - Steve Patterson, Managing Director - Intelligent Pensions
 - Bruce Moss, Strategy Director & Founder - eValue
- Discussion (30 mins)
- 11:00 Tea/Coffee
- 11.30 **“A New Proposition”**
- Will Watling, Product Marketing Director - Altus
- Discussion
- 12.00 **Session 4 – “The Bigger Picture”**
(15 minutes each speaker)
- Patrick O’Sullivan, Director, Investment Consulting - Redington
 - Debora Price, Gerontologist – King’s College London
 - John Nugée, Director - Laburnum Consulting
 - Robin Ellison, Partner – Pinsent Masons
- Discussion (25 mins)
- 13:25 Closing thoughts & comments
- 13:30 Lunch/depart

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