



The-Pensions-Net-Work

"Leading Thought in Long Term Savings"

Thursday, 15th October

ZOOM MEETING

5:30 pm – 7:00 pm

Hi all and welcome to the agenda for the second in our Autumn series of virtual meetings. We had a great session last time on the subject of "Value for Money" with three terrific panellists – Henry Tapper, Mick McAteer and Kim Gubler who sparked a great debate. This time we are turning our attention to a very topical and important subject "the future for advice". This is a very big topic which impacts on both workplace and non-workplace pensions along with pensioners and many others. I am delighted to say that we have lined up another great panel with very different experience and perspectives. The panellists are sure to provide plenty of scope for discussion and debate – so don't delay in getting in touch to confirm your place. I hope to see you on screen on the 15th.

Discussion Topic

The future for "advice"

Panellists



Liz Field
Chief Executive
PIMFA

Liz joined PIMFA (the trade body for financial advisers and investment managers) as Chief Executive in 2014. She has 30 years financial services experience and has successfully advised and transformed many businesses. She describes herself as a people person and has a great deal of experience of corporate culture risk, regulatory knowhow and of providing good practice guidelines for the industry. She is an accredited coach and leader and encourages the collaborative participation of diverse groups of industry experts.



Matt Ward
Communications Director
AKG Analytics

Matt joined AKG in July 2014 following a long stint at the product research company Defaqto. Matt is heavily involved in the development and delivery of AKG's consultancy services proposition to product providers and financial advisers. Earlier this year Matt authored an AKG research paper "Future of Advice – Beneath and Beyond" and will be sharing some of the findings with us. Matt currently chairs ILAG's Wealth Management Strategy Group.



Dominic Holmes
Business Development Director
Hub Financial Solutions

Dominic is no stranger to TPNW having attended several meetings when he was working for Aegon. He has more than thirty years' experience in financial services distribution, sales and marketing. Dominic joined Just in 2012 and is a member of the HUB Financial Solutions senior leadership team, managing distribution partnerships across retail and corporate pensions, care and lifetime mortgage markets - on both an advised and non-advised basis.



Lee Robertson
CEO & Founder
OCTO

Lee is the Managing Director of Octo Members, the very first app based private community for UK financial services professionals, where advisers, fund managers, wealth managers and professional consultants can come together to share knowledge and best practices. He was the Founding Director of Investment Quorum and stepped back from the business in August 2018 after nearly two decades at the helm. Lee is a chartered wealth manager and winner of many awards.

Please book your place in advance via enquiries@the-net-work-meetings.com

We look forward to "seeing" you.



John Moret
Chairman
The-Pensions-Net-Work



Patricia McSherry
Managing Director
The Net-Work Meetings Limited

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www.the-net-work-meetings.com

enquiries@the-net-work-meetings.com

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