

Thursday, 20th May 2021

ONLINE MEETING

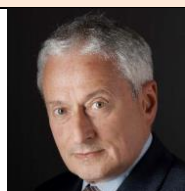
5:30 pm – 7:00 pm

Welcome to the agenda for our latest "virtual" panel discussion on a subject which could not be more topical. The recent Court of Appeal judgment in the Adams V Carey/Options case has caused consternation well beyond the world of SIPP's – and there are plenty of other pensions related legal and regulatory issues confronting providers, advisers, trustees and consultants whichever part of the industry you work in. As usual we have a panel line up of experts who I know will shed a lot of light on many of the complex issues and will also stimulate a wide-ranging discussion. This is not a meeting just for legal eagles and I recommend you take ninety minutes out of your schedules to join the audience for our fifteenth virtual discussion. I am sure it will prove worthwhile, and I look forward to seeing you online.

Discussion Topic

"Pensions, the Law and the Regulator"

Panellists



Robin Ellison
Consultant
Pinsent Masons

Robin needs no introduction. He's a solicitor and consultant to one of the leading law firms and has spoken at several TPNW events in the past and can be guaranteed to be both entertaining and provocative. He's a member of our Advisory Board and in 2016 won our 10 year award for the most entertaining after dinner speaker. He's author of an excellent book "Red Tape – managing excess in law, regulation and the courts" so we couldn't have anyone better to participate in this discussion.



Anthony Raymond
General Counsel and
Director of Legal Services
The Pensions Regulator

Tony has been at the TPR since 2008 and he manages and leads a team of litigation lawyers and provides strategic direction and oversight on all DB and DC litigation cases. Prior to the TPR Tony spent over ten years with a leading law firm where he practiced in all areas of criminal litigation and specialised in white collar crime work! He has vast experience of the role of the regulator in legal matters and I'm delighted that he is able to join the panel.



Christine Hallett
Managing Director
Options UK

Christine founded the Carey Pensions (now known as Options) business in 2009 having previously worked for Poynton York SIPP Solutions for over 12 years. Christine has spent over 40 years in financial services, starting as a clerk in Midland Bank to eventually launching a pension business to match her vision. Recently she has had first hand experience of the interaction of regulation and the law through the well publicised Adams V Carey/Options case.



David Allinson
Partner
RPC

David is a partner at RPC. David specialises in claims against financial professionals, including IFAs, pension advisors and wealth managers and has extensive experience in defending financial advisors against negligence claims, as well as providing coverage advice to insurers. David has particular expertise with past business reviews involving FCA regulated businesses and he also has considerable experience of defending FOS complaints



Victoria Hicks
Director
City & Capital Group

Victoria is a Director of City and Capital Group. Vicki has worked in financial services for fifteen years and is a chartered financial planner. Immediately prior to joining City & Capital she had run her own business. More recently along with some industry colleagues she set up Financial Planners United to help smaller firms fight soaring regulatory costs. More than 250 Financial Planners and wealth managers have backed their campaign.

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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