

The-Pensions-Net-Work

"Leading Thought in Long Term Savings"

25th & 26th September 2025

St. Anne's Manor, London Road, Wokingham RG40 1ST

AGENDA

Tea/Coffee 17:00		Meeting Starts 17.30
 <p>John Moret Chairman The-Pensions-Net-Work</p>		<p>Hi all and here is the final version of the programme for our late September meeting. We have postponed the technical update talk until our November meeting -which is now the two days day after the budget. In its place I am delighted that Dr Suzy Morrissey has agree to lead a shorter session on the State Pension Age Review. She has been appointed by DWP to prepare an independent report for the government ahead of the third review of State Pension Age. This is a great opportunity to discover Suzy's thinking and also potentially input. This will be the first ever TPNW meeting with all women speakers. A lot has happened over the summer in the world of pensions and our agenda promises to provide plenty of information on many of the current hot topics with lots of scope for discussion and debate. Our last meeting in May was a huge success and it would be great to keep the momentum going. So do try and get along -and if you can't make it hopefully find a colleague who can. I look forward to seeing as many of you as possible in Wokingham in September.</p>
17.40 - 19.00		
 <p>Heidi Karjalainen Senior Research Economist Institute for Fiscal Studies</p>		<p>"The Pensions Review"</p> <p>I am very pleased to welcome Heidi to our meeting. Heidi played a crucial role in the preparation of the final report of the IFS "Pensions Review" which received extensive media coverage in early July as many of you will be aware. Heidi joined IFS in 2019 working in the Retirement, Savings and Ageing sectors. She has contributed to a number of IFS research papers. Before joining the IFS Heidi worked in the private sector in infrastructure financing. She has a MSc(Distinction) in Economics from UCL having obtained a first class honours degree in Economics from Edinburgh University. Heidi's talk should make for a great and very topical start to our meeting.</p>
Drinks at the Bar 19:00		Dinner 19:30
After dinner		
 <p>Kathy Byrne Insurance Professional Non-Executive Director</p>		<p>"My Story"</p> <p>It is a great pleasure to welcome Kathy Byrne as our after dinner speaker. Kathy has worked in financial services for forty years and has an eclectic mixture of experience in insurance, savings and risk. She is an actuary and currently holds NED roles at Just plc's life and mortgage companies and at Amicorp Fund Services UK plc. Her previous NED experience includes being a Board Member of the Association of Financial Mutuals (AFM). She is one of the owners and founders of Alpasión vineyard in Mendoza, Argentina and she is an ambassador for Alpasión in the UK. I am sure we'll hear more about this during her talk which promises to be a fascinating mix of actuarial insight and vinification!</p>
FRIDAY		
Tea/Coffee 08:15		Meeting Starts 08:30
08.35 – 09:40		
 <p>Dr Suzy Morrissey Deputy Director PPI</p>		<p>"The State Pension Age Review"</p> <p>As mentioned above Suzy has been appointed by DWP to prepare an independent report for the government ahead of the third review of State Pension Age. In this shorter than normal session Suzy will outline the scope and purpose of this review, the questions she plans to address and her progress to date and is willing to receive questions and feedback that may help her <i>formulate her views. This is a rare opportunity to discover more about what is a highly topical and crucial aspect of state pension provision and policy. Don't miss it!</i></p>

09:40 – 10:45



Margaret Kirby MBE
Founder
Legacare (UK) Ltd

"Pension perils"

Meg was due to give this talk in February but had to postpone so I am delighted to welcome her back. Meg was awarded an MBE in this year's New Year's honours for her services to the law and to vulnerable people. In 2011, she set up LegaCare, a charity that provides legal advice and support to vulnerable people affected by life threatening/terminal illness, working alongside the NHS who refer patients into the charity. Most of their clients are socially and/or financially excluded or simply don't have the energy to sort their affairs. Before then, as a solicitor Meg spent over 20 years advising the life and disability insurance industry. This should be a really fascinating insight into an area which we don't often cover.

Tea/Coffee Break

11:15 – 12:15



Louise Davey
Trustee Director and Head of Policy and
External Affairs
Independent Governance Group

"This is the year to reshape pensions and boost economic growth"

Louise spoke to us in February 2024 when she was interim director at TPR. Since then she's taken up a new position at IGG and earlier this year in her role she wrote an excellent article with the above title. In the article Louise urged the government to work in partnership with the pensions industry to co-design reforms to drive investment and growth in a bid to avoid unintended consequences and to ensure there are "practical solutions" to the growth challenge. With over thirty years' experience in the pensions industry over half of which was at the TPR her views are well worth hearing. It will be interesting to learn if she believes the government with its pensions reviews is on course!

12:15– 13.25

PANEL SESSION



Sam Gould
Head of PR &
Campaigns
Now Pensions



**Dr Suzy
Morrissey**
Deputy
Director
PPI

"The pensions gender gap"

Neither of our last two speakers really need any introduction. Sam from Now Pensions spoke to us on this same subject in June 2023 and it will be interesting to get her views on whether there has been any improvement in the position since then. Suzy gave a fascinating talk last November drawing on her experience from New Zealand. She has been a regular presenter and commentator on pensions, including the gender pensions gap and broader issues related to older people and welfare. More recently she has been appointed to lead the review of the UK state pension age. I am not entirely sure at this point how Sam & Suzy plan to run this last session but given its topicality and relevance to the whole issue of pensions adequacy I am sure it will prove a perfect way to end our meeting.

Meeting Ends 13:30

Lunch 13:35

Depart



John Moret
Chair
The-Pensions-Net-Work

Please book your places via enquiries@nwml.co.uk

We look forward to seeing you at St. Anne's Manor



Patricia McSherry
Owner
The Net-Work Meetings Ltd

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Telephone: 01761 418 755

www.the-net-work-meetings.com

enquiries@nwm.co.uk

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