



# The-Pensions-Net-Work

*"Leading Thought In The Employee Benefits Market"*

**5th & 6th March 2015**

**Woodlands Park Hotel, Woodlands Lane, Stoke D'Abernon, Cobham, Surrey KT11 3QB**



**John Moret**  
Chair  
The-Pensions-Net-Work

Hi everyone and a very Happy New Year to all.

2015 promises to be a memorable year for all involved in the world of pensions – not to mention politics. And of course there are two big sporting events -the Cricket World Cup in February/March and the Rugby World Cup in September/October. Odds on a double England victory?

We'll be looking to run a special meeting In September at which we'll be reviewing the first 5 months of pensions freedom and flexibility. More details to follow. In the meantime I'm delighted to introduce the agenda for our first meeting of 2015 at one of our favourite venues – the Woodlands Park Hotel in Cobham. Once again we've lined up an awesome list of speakers –with one further name to be unveiled - with a diverse range of topics. As usual there should be something for everyone. We had to put up the full house notices for the last meeting and it would be great to kick off our first meeting in 2015 in similar fashion.

**Thursday, 17.35 - 19.00**



**Martyn Evans**  
Head of Consulting  
Altus

***"The Real Cost of Innovation: Looking Beyond the 3-year Business Case"***

Our first speaker Martyn Evans is a regular attendee at the Pension Network. As head of consulting at Altus – our sponsors to whom we are very grateful – Martyn will bring a different perspective on the seismic changes underway in the UK pensions industry. He has a wealth of experience in the insurance sector and has been involved in a number of the largest Life Co mergers and transformations of recent years. He often describes his role as "sorting out the operational mess after propositional tinkering!", so it should make for a very lively start to our meeting and one definitely not to miss.

**Thursday, after dinner**



**Ken Davy**  
Chairman  
SimplyBiz Services

***"Welcome to a whole new world"***

Our after dinner speaker will need no introduction to those who've worked for any length of time in the world of pensions and financial services. He is one of the industry giants having set up SimplyBiz in 2003 to provide development, research and marketing services to financial advisers. Currently SimplyBiz provides support services to some 5,000 directly authorised advisers from over 2,000 firms –an incredible achievement. Prior to SimplyBiz he'd grown his one man IFA business DBS to a stock market listing and reputedly it was sold for £75million in 2001. He has strong views on just about everything but particularly the role of the IFA – and the regulatory framework that surrounds them. He is also Chairman of the rugby league team Huddersfield Giants. I'm assuming the new world Ken will be talking about is related to financial services – not rugby league!

**Friday, 08.35 – 09:40**



**Mark Wood**  
Chief Executive Officer  
JLT Benefit Solutions

***"Pensions Reform a monumental case of misselling"***

Our next speaker is another industry heavyweight who is unlikely to need any introduction. Currently CEO at JLT Benefit solutions – a role he took over in 2013 – his career in financial services spans many years and roles. Starting at PWC Mark went onto Barclays and AA Insurance before being appointed CEO of AXA Equity & Law which subsequently acquired Sun Life. In 2001 Mark joined Prudential plc as UK and European Chief Executive before in 2005 he founded and became chief executive of Paternoster a company which was one of the early pioneers of outsourcing risk from defined benefit pension schemes and was eventually sold to Goldman Sachs. A man with strong views on many issues – not just pensions related – this is bound to be an enthralling session



**Malcolm Booth**  
CEO  
NFOP

***"NFOP - Its history and relevance today"***

Malcolm Booth has been CEO of the National Federation of Occupational Pensioners for just over 2 years and has worked for NFOP since 2007. Prior to that Malcolm was Deputy CEO at Foresters Friendly Society. The NFOP is a not for profit organisation with 80,000 members and was set up over 80 years ago. As the title to Malcom's talk suggests he will provide more background on the way the organisation has developed over the years and also give us his thoughts on its role today and going forward as the whole workplace pensions environment experiences massive change



**Brian Spence**  
Founder  
Spence and Partners Limited

***"Is the Triennial Actuarial Valuation dead? Challenges and Rewards of daily valuation"***

Brian is an actuary and founder of Spence & Partners Limited, a privately owned firm of actuaries, pension consultants, pension scheme IT specialists and administrators. Brian has particular expertise in acting either as an actuarial adviser to pension scheme trustees or alternatively as an independent actuarial adviser to the sponsoring employer, including advice relating to pension aspects of mergers and acquisitions. Brian is also involved in acting as a professional pension scheme trustee through a sister company Dalriada Trustees Limited which is an independent trustee. Brian is also a director of Veratta, a company which provides data management, information security, software development and IT support within the pensions and financial services industries. All three companies are members of the Ellcon group of companies. Whatever topic Brian chooses to talk about given his vast and wide ranging experience it's bound to be of interest.



**Anna Rogers**  
Chair, APL &  
Partner, Mayer Brown

***"Paying the right benefits – how hard can it be? Achieving a clean break on buyout, latent liabilities and what is going on in the Courts"***

For our final speaker I'm delighted to welcome Anna Rogers who is partner in the London office of lawyers Mayer Brown International and is also current chair of the Association of Pension Lawyers. Her current work focuses on different aspects of the journey to ultimate pension scheme winding-up. She is currently engaged in governance, compliance and liability management including incentive exercises of all kinds. Anna will be talking about how the courts (and Pensions Regulator?) may approach mismatches between scheme documents and admin practice, and how to minimise the risks. Another talk definitely not to miss.

So another great line up with huge diversity of content and some real industry experts. Places are bound to go quickly so book early via [enquiries@the-net-work-meetings.com](mailto:enquiries@the-net-work-meetings.com)

Patricia and I look forward to seeing you in Cobham in March.

John Moret.  
Chair

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