

Thursday, 5th November

ZOOM MEETING

5:30 pm – 7:00 pm

Welcome to the agenda for our next "virtual" panel session. These meetings continue to go from strength to strength and I am absolutely confident that this meeting will maintain the standards set in previous sessions. I got the idea for this meeting from a provocative article that I read that suggested that the dashboard was the pensions industry's "Crossrail" project, that the pandemic had exposed the fragility in many providers service capabilities and that unlike open banking which is a reality open pensions seem further away than Crossrail. We have assembled a great panel to discuss these and the related issues and I think this may well turn out to be the liveliest session so far. Just a reminder that following a straw poll at the last meeting the session on 26th November will now be "Pension Scheme Investment – Green for go" -which should be another cracking discussion. So once again I urge you to contact Patricia to reserve your places at both these sessions.

Discussion Topic

"Will pensions ever leave the digital stone age?"

Panellists



Chris Connelly
Propositions & Solutions
Director
Equiniti

Chris will be known to many of you. He is a regular attendee at our meetings representing our sponsors Equiniti. He is currently seconded part-time to MAPs where he is working on the Pensions Dashboard programme. Chris has 25 years' experience in life & pensions administration, system support, software design and product management.



Philip Brown
Interim Group Director of Policy
and External Affairs
B&CE

Philip has been a regular attendee at TPNW for several years -principally when he was working at LV and led the work on the development of their online retirement advice service which included the acquisition of Wealth Wizards. Philip spoke on the subject of "Real Robo Advice" in March 2016. He is currently in an interim role at B&CE - the provider of the People's Pension.



Samantha Seaton
CEO
MoneyHub

Samantha is CEO at the Open Banking platform Moneyhub and is a member of the Pension Dashboards Programme steering group. Moneyhub's aim is to change people's thoughts and feelings about their own financial world for the better through enabling effortless money management and informed decision-making. Previously Sam several key senior roles and at Towers Watson she was involved in leading the development of digital financial planning solutions. Sam gave a great after dinner talk in 2018 and it is a pleasure to welcome her back.



Georgia Stewart
CEO
Tumelo

Georgia set up Tumelo in 2018 with two of her colleagues from Cambridge University. Tumelo enables investment providers to engage their retail and pension customers. Their white-label software plugs into existing investment platforms and pension portals, driving positive customer interactions in order to increase retention and AUM for their partners, as well as deriving deep customer insights. They have recently announced a pilot project with Legal & General Investment Management.

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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