






The-Pensions-Net-Work

"Leading Thought in Long Term Savings"



8th & 9th June 2023

Audleys Wood Hotel, Alton Road, Basingstoke, Hampshire, RG25 2JT

Tea/Coffee 17:00		Meeting Starts 17.30
 <p>John Moret Chairman The-Pensions-Net-Work</p>	<p>Hi all, After a very successful face to face meeting in March I am delighted to welcome you to the programme for our June meeting. Once again we have an eclectic mix of content with some great speakers – some who are known to TPNW and others who are appearing for the first time. I believe there really is something for everyone in the agenda and I would particularly highlight our after-dinner speaker who I am sure will really provide an enlightening and entertaining end to our meal. We have two double acts – a panel session and we’ve even managed to squeeze in an extra session to provide an update on the pensions dashboard. So I hope to see as many of you as possible in Basingstoke next month for what I know will be another great networking event.</p>	
17.40 - 19.00		
 <p>Neil Cantle Principal & Consulting Actuary Milliman</p>	<p><i>"Making Sense of a Complex World"</i> Many of you will have heard Neil speak at TPNW in the past. Neil has over 30 years' experience working in financial services and has spent over 20 years working in risk management. Neil is widely recognised as a thought-leader in risk management. He initiated, and leads, the global development of Milliman's CRISALIS™ methodology for assessing and quantifying complex risks. On this occasion Neil is planning to examine around how to make sense of what is going on in the world from a risk perspective (geopolitics, climate, cyber, pandemics, ...) and relate that to managing retirement promises over long periods with the aim of creating structured ways to think through all of the complexity and come up with actionable insights. It sounds fascinating so don't miss it.</p>	
Drinks at the Bar 19:00		Dinner 19:30
After dinner		
 <p>Walid Al Saqqaf CEO & Co-Founder Rebalance Earth</p>	<p><i>"Rebalance Earth and the Pensions Industry"</i> Walid Al Saqqaf is the CEO and co-founder of Rebalance Earth - a global ecosystems services platform for valuing and funding a living nature to combat climate change, biodiversity loss and lifting communities out of poverty. With a background in the financial industry, Walid has launched multiple start-ups at the forefront of cutting-edge technologies such as blockchain, AI, and IoT, focusing on solving real business challenges. Walid is a passionate entrepreneur committed to driving positive change through innovative solutions and he will explain how Rebalance Earth's mission is relevant to the pensions industry. I can't think of a better way to round off a meal!</p>	
FRIDAY		
Tea/Coffee 08:15		Meeting Starts 08:30
08.35 – 09:40		
 <p>Iain Clacher Professor of Pensions & Finance University of Leeds</p>	 <p>Dr. Con Keating Head of Research Brighton Rock Group</p>	<p><i>"LDI – the good, the bad and the very, very ugly."</i> Both Iain and Con will be well known to many members as they have spoken at sessions in the past. In 2017 Iain spoke on trustee decision making and value for money in investment decision making and a few months earlier Con had debated funding issues for DB schemes. This time they are joining forces to look at a very topical issue which promoted some considerable discussion and debate at our meeting last November. Their thoughts and criticisms of LDI have received significant publicity and last year they provided written evidence to the Work and Pensions select committee on the subject. More recently they produced a blog "Portfolio Resilience – the transition to LDI II". A big subject which is still under review – this should make for an enthralling start to Friday's proceedings.</p>

09:40 – 10:45



John Chapman
Director
Catalyst Partners Limited

Roderic Rennison
Director
Catalyst Partners Limited

“Making Sense of Consolidation in the Financial Services Market”

Our second double act addresses a very different issue – the impact of the apparent acceleration of consolidation across all parts of the financial services market. To lead this session we have two partners in a specialist business – Catalyst Partners – which focusses on enabling the owners of businesses to maximise and realise the full value in their businesses with a particular emphasis on the IFA and Wealth Management markets. Both John and Roderic have many years of experience within the financial services markets. Roderic has held senior management roles in a number of major financial services companies and John is a chartered accountant and was MD of a large intermediary business Torquil Clark which was sold to Skipton Building Society and then resold to a consolidator Bellpenny. Definitely a session not to miss.

Tea/Coffee Break

11:15 – 12:15



Samantha Gould
Head of PR and Campaigns
NOW:Pensions

“The Latest Developments in Solving the Gender Pensions Gap”

Sam Gould has had a key role in Now Pensions pioneering work on the gender pensions gap. Sam has authored and contributed to several reports on the subject. A self-confessed pensions geek in her own words Sam has dedicated “most of my working hours to the gender pension gap and putting gender pensions on the map.” Sam is currently working on two new initiatives which are currently under wraps but she will be in a position to talk about both at our session in June. This isn’t the first time we’ve discussed this issue at TPNW but Sam’s passion and enthusiasm when talking about this subject is not to be missed.

12:15– 12.45



Jonathan Hawkins
Principal Consultant
Bravura

“Pensions Dashboard Update”

Our final session is split into two parts for brief updates on two very topical subjects. In the first Jonathan Hawkins will update us on the current state of play and lead onto “what next”. Bravura have recently completed a collaboration with Moneyhub connecting parts of the ecosystem to show the UK multi-dashboards proposition in action using the proper tech and APIs and Jonathan will update on this too. He gave a very entertaining and knowledgeable presentation on this subject at our meeting last June - it will be interesting to learn the progress made!

12:45– 1.25

PANEL DISCUSSION

“Consumer Duty – Going Live “

To close our meeting we will have a short panel session on another topic which is a top priority for all FCA regulated businesses – consumer duty. All such businesses must have a plan in place by the end of July for delivering the four outcomes which the FCA have identified as crucial to meeting the requirements of consumer duty. Our panellists will share the approach taken, and the lessons learnt so far and their plans for meeting the July deadline. Another important session not to be missed.

Meeting Ends 13:30

Lunch 13:35

Depart



John Moret
Chair
The-Pensions-Net-Work

Please book your places via enquiries@the-net-work-meetings.com

We look forward to seeing you at Audleys Wood Hotel



Patricia McSherry
Owner
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