

# The-Pensions-Net-Work

*"Leading Thought in Long Term Savings"*



**28<sup>th</sup> & 29<sup>th</sup> June 2018**

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

Thursday		Tea/Coffee 17:00 - Meeting Starts 17:30
 <p><b>John Moret</b> Chairman The-Pensions-Net-Work</p>	<p>Welcome to the agenda for our second meeting of the year. By the end of the meeting we will have passed the summer solstice and England may already have been knocked out of the World Cup. Talking of which we are well aware that there is an unfortunate clash on the Thursday evening with England's final group match against Belgium. Having taken straw polls of some of the membership and the Advisory Board we've decided to accommodate the football fans by dispensing with the normal dinner format –and instead the match will be shown on a screen in the Pavilion, where we hold the meeting, over dinner. Those not wishing to watch will be accommodated in the Pavilion, but on separate tables away from the football.</p> <p>The rest of the meeting once again has an amazingly strong and interesting speaker line up with a double header before the football and another very topical panel session to close the meeting on Friday.</p> <p>Since our last meeting we held a very successful pilot meeting in Scotland which I think we will look to repeat. There were brilliant talks with my personal favourite being the after dinner address from Paul Masterton MP who was quite awesome in his knowledge of all things pensions. I hope to see you in Basingstoke.</p>	
<b>Thursday, 17.35 - 19.00</b>		
 <p><b>Henry Tapper</b> Business Development Director First Actuarial</p>	 <p><b>Duncan Howorth</b> Executive Chairman ITM</p>	<p><b><i>"The limited case for Collective DC" and "Pensions Dashboard - running on the rails or shunted to the sidings?"</i></b></p> <p>To kick off our meeting we have two speakers who need no introduction both being regular attendees at TPNW –and two highly topical subjects. We will have two shortened sessions of around 40 minutes for each topic. Henry Tapper – no doubt that his much beloved Yeovil Town just managed to avoid relegation - will go first on one of his pet subjects - Collective DC- and will argue that whilst not right for all there is a case for CDC in certain circumstances. Duncan Howorth will follow with an abbreviated version of the talk that he had planned to give at our recent Scottish meeting which unfortunately he had to miss at the last minute. The delay may be to our benefit as it is possible that by the time of the meeting the DWP will have published their plans for the roll out of the pensions dashboard.</p> <p>These should be two great talks so if you're coming to the meeting don't be late.</p>
<b>Football / Dinner</b>		
 <p><b>Lucian Camp</b> Managing Director Lucian Camp Consulting</p>	<p>As mentioned above the plans for the dinner remain a little fluid but the good news is that if you are a football fan you will be able to watch the match whilst enjoying your dinner – and if you don't want to watch it you can still have dinner with colleagues of a similar mind.</p> <p><b><i>"The word you should never ask a marketer to define"</i></b></p> <p>Our after-dinner and after-match speaker needs no introduction. Lucian has kindly agreed to talk to us about some of the research that was carried out among financial services marketing people for his book No Small Change. Lucian tells us he may have to adapt his talk a bit depending on how well (or how badly) the football has gone.</p>	



**Claire Turner**  
Director of Evidence  
Centre for Ageing Better

***"Planning and preparing for a good later life"***

I am delighted to welcome Claire Turner from "Centre for Ageing Better" –an independent charity that focusses on the changes that are needed with increasing longevity so that more people enjoy good health, are financially secure, are socially connected and have a purpose in later life. As well as being the Director in charge of the charity's research function, Claire leads on their work on planning and preparing for later life (including financial planning and pensions) and inequalities. The Centre has recently commissioned an evidence review of the barriers and enablers to planning and preparing for later life, and Claire will be looking to share some of the findings in her talk. It should make for really interesting start to our Friday session.

Friday, 09:40 – 10:45



**Belden Menkus**  
Founder & Director  
Menkus & Associates

***"Design for Speed: what to do now about getting to the future faster"***

I am delighted to welcome back to TPNW Belden Menkus of Menkus Associates. Belden has spoken at two previous TPNW meetings both on the subject of change and the chaotic world that we live in. On this occasion he will be providing us with some insight into a new initiative that he has been piloting through his business –"Design for Speed". To quote Belden: "Today, most organisational design tries to optimise the balance between (minimum) cost and (maximum) control, without an explicit focus on speed. However, for many organisations, speed is a growing issue: they aren't moving fast enough. This initiative will look at the ways organisations respond to emerging threats and opportunities with the intention of creating practical tools and approaches that allow organisations to quickly and effectively re-design themselves for speed." This should be a really thought provoking session whatever business you are in –and definitely not to be missed.

Tea/Coffee 10:45 followed by Panel session 11.15-13.25



**Will Watling**

Principal  
Consultant

Altus



**Rebecca Murphy**

Director of  
Sales & Marketing

Praemium



**Colin Simmons**

Business  
Development  
Manager

Prudential



**Anthony Carty**

Group Financial  
Planning & Business  
Development  
Director

Clifton Asset  
Management



**William Allport**

Senior Strategist

Vanguard



**David Hutchins**

Senior VP,  
Lead Portfolio  
Manager

Alliance Bernstein



**Andrew Lewis**

Senior Investment  
Director, Head of  
Wales Office

Brooks MacDonald

***"Investment Management Solutions to produce Stable Income in Retirement"***

To conclude our meeting, we have what promises to be a fascinating panel session looking at a range of investment solutions designed for the post pensions freedom world. Will Watling, member of our Advisory Board, has put the panel together and will facilitate the discussion and oversee the presentations from six panellists with contrasting viewpoints. Details of the panellists are given above. It should make for some lively discussion and debate on a subject which remains vitally important as the post pensions freedom world enters its fourth year with substantial potential assets up "for grabs" to those providing desirable and desired retirement outcomes. Definitely a session not to be missed.

Lunch 13:30

Depart

Places are bound to go quickly so please book early via [enquiries@the-net-work-meetings.com](mailto:enquiries@the-net-work-meetings.com)  
We look forward to seeing you at the Audleys Wood Hotel.

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

**Patricia McSherry**  
Director  
The-Pensions-Net-Work

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