

The-Pensions-Net-Work

"Leading Thought in Long Term Savings"



9th & 10th June 2016

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



John Moret
Chair
The-Pensions-Net-Work

A warm welcome to the programme for our second meeting of 2016 – our tenth anniversary year. And I'm delighted to say that we have an additional sponsor as LV= have joined Altus in this capacity. Many thanks to both organisations for their continuing support of TPNW – and if your organisation would like to join them Patricia would be delighted to discuss further with you. Once again I think we have a stellar line up of speakers for what is traditionally our summer meeting. We have a great mixture of speakers from academic and commercial backgrounds, public and private sector and with expertise covering a huge swathe of topical pension issues. Hopefully if the weather is good the Audleys Wood Hotel will be a super venue – particularly if we can divert the helicopters!

With the impressive line up of speakers I expect places to fill up fast so if you haven't already booked your place I would urge you to do so as soon as possible. I very much hope to see you in June

Thursday, 17.35 - 19.00



Debora Price
Professor of Social Gerontology
Manchester University

"Financial capacity of the older population and the challenges for financial advisers"

Debbie is no stranger to TPNW having spoken at two previous meetings when she received great feedback. Since her last talk Debbie has moved from Kings College London to take up the chair in the Social Gerontology department at the University of Manchester. One of the leading experts in this field in the UK Debbie is going to be talking about the vitally important issue of the financial capacity of the older population – an issue which I believe is going to grow in importance with the new pension freedoms. Financial advisers have a vital role to play here and Debbie will be looking at some of the issues they face in dealing with those in later. It should be a great opening session and definitely one not to miss.

Thursday, after dinner



Kevin Wesbroom
Senior Partner
Aon Hewitt Consulting

"Pensions – the past, the present and the future"

Kevin will be well known to most of our members particularly those involved with the world of workplace pensions. Kevin has spent almost all of his career with Aon Hewitt – or with companies that have been acquired by Aon Hewitt. He is an experienced pension consultant who has been advising high profile clients for over 40 years. He is a qualified scheme actuary who has been involved with many different aspects of pension, investment and broader employee benefits. He has been strong supporter of CDC and has always been in demand as a conference speaker because of his great understanding of a wide range of pensions issues. Unsurprisingly he is also a favourite of the media. The title of his talk gives him plenty of scope for Kevin to draw on all of his experience – so it should make for an entertaining end to our dinner.

Friday, 08.35 – 09:40



Billy Burrows
Director
William Burrows Annuities

"The future of annuities (1st hand and 2nd hand)"

To kick off our Friday morning sessions I'm delighted to welcome someone I've known for nearly 25 years. Few people know the world of retirement options better than Billy. As he says on his website "I am passionate about helping people make the right decisions when they retire". An entrepreneur and academic Billy helped set up Annuity Direct in 1993. In 1998 he set up William Burrows Annuities (WBA) and after a short stint at Prudential he then spent several years in the advisory market with WBA which for several years was a trading name of Aspen (actuaries and pension consultants) plc. That business was eventually sold to Capita & after stints with a number of advisory firms in 2013 he went back to his roots with WBA. His consultancy business, Retirement Intelligence, has published a number of thought leadership papers. A true expert in his field I can think of no-one better than Billy to talk about the future role of annuities.



Melissa Giordano
Head of Pensions & Savings Strategy
HM Treasury

“Lifetime ISA – changing the conversation about retirement”

Following on from Jamie I’m delighted finally to welcome Melissa Giordano from HM Treasury. I had hoped to get Melissa to speak at the March meeting but with all the activity following the Treasury consultation understandably she was “otherwise engaged”. Even now I gather her business life is pretty manic following the announcements regarding LISA. From the title of Melissa’s talk you’ll see this promises to be a fascinating session providing an insight into the Treasury’s current thinking on the whole pensions and savings landscape. Those of you who were fortunate enough to attend Charlotte Clark’s (DWP) talk some 18 months ago will recall how interesting that was and I feel sure that Melissa will be equally absorbing. Definitely one not to be missed.



Fiona Nicol
Casework Director
Pensions Ombudsman Service

“The Pensions Ombudsman Service – a new approach”

Following the appointment of the leading pensions lawyer Antony Arter as the Pensions Ombudsman I’ve been keen to have a speaker from that organisation who can update us on the impact of Antony’s appointment. I’m delighted to welcome Fiona Nicol to TPNW. Fiona is one of three directors at The Pensions Ombudsman (TPO) who together with Antony Arter make up the Executive Board. Fiona has been at TPO since 2004 so she has a wealth of experience to share with us. There have been some interesting determinations recently at TPO –particularly in the world of SIPPs –although there remains some confusion about the interaction with The Financial Ombudsman. I’ve no doubt Fiona will comment on some of these issues during her talk.



Jamie Jenkins
Head of Pensions Strategy
Standard Life

“Auto enrolment and pension freedoms – the two enduring changes that will shape the future of pensions?”

Our final speaker is another leading pensions strategist from a major pensions provider. I doubt that Jamie needs much introduction. He’s been around the financial services scene for over 25 years much of it in the workplace pensions arena with Standard Life. Jamie is a serious “tweeter” @pensionsguy from which I learnt that he recently got married - you can see some honeymoon shots on his twitter account – and he also played in the recent English Billiards Open! He’s regularly in the media and in the last few weeks he’s appeared on Moneybox Live and Sky News. He’s Chair of TISA’s Retirement Council and I know his talk will be entertaining and provoke a lot of discussion. It should round off perfectly what promises to be an exceptionally topical meeting.

I hope you’ll agree that this is another great line up. Places are bound to go quickly so please book early via enquiries@the-net-work-meetings.com

Patricia and I look forward to seeing you at Audleys Wood in June.

Best wishes,
John Moret. Chair

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