

AGENDA

12th & 13th March 2020

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

Thursday		Tea/Coffee 17:00 - Meeting Starts 17:30
 <p>John Moret Chairman The-Pensions-Net-Work</p>	<p>Hi all and a warm welcome to a new decade of TPNW. The attendance at our last meeting in Windsor was a little disappointing which was a shame because once again we had some excellent talks and a really interesting panel session. Copies of the slides are available for members as usual on the website. For our first meeting in 2020 we have another great line up of speakers and subject matter. Many of the speakers will be known to you as most have appeared at TPNW at some point over recent years. I think the three individual speaker sessions are all going to be very stimulating and highly topical. Our after-dinner speaker Malcom Kerr has spoken at several previous meetings but this time he will be able to entertain us with what I am sure will be some brilliant and very entertaining reflections on our industry. I expect the panel session to be a highlight as the three confirmed panellists all have expertise and a different perspective on the issues & challenges posed by changing longevity patterns. Definitely not to be missed. Finally, I must thank our retiring sponsors Altus who have been a huge support to TPNW over the last 7 years. Their backing and active participation has been really appreciated. I look forward to seeing as many of you as possible in March.</p>	
Thursday, 17.30 - 19.00		
 <p>Abraham Okasanyu Principal FinalytiQ</p>	<p><i>"Retirement Income Needs A New User Experience (UX)"</i></p> <p>Those of you who have heard Abraham speak before either at TPNW or elsewhere will know that we're in for a treat and a very lively session to kick off our meeting. Abraham is founder of investment and retirement research consultancy, FinalytiQ and creator of Timeline.co, an innovative online application for illustrating sustainable withdrawal strategies in retirement portfolios. He has authored several industry papers and delivered talks to many audiences across the country.</p> <p>A really enthusiastic and entertaining presenter and an acknowledged expert in the area of retirement outcomes I can think of no one better to lead our first session of the new decade. Don't be late for a not to be missed talk.</p>	
Drinks at the Bar 19:00 - Dinner 19:30		
 <p>Malcolm Kerr Independent Consultant malcolmkerr.com</p>	<p><i>"What could possibly go wrong!"</i></p> <p>Malcolm has been working in the long-term savings, investment and protection markets for nearly 50 years and has spoken at TPNW on several occasions. Following thirty years working in the life assurance industry he joined KPMG Consulting as a Director in 1998. In 2004 he joined EY as an Executive Director and over the following ten years he worked on over 100 engagements. Clients included all of the top ten life companies plus many others including leading asset and wealth managers, banks, platforms, networks and large intermediaries. In 2014, Malcolm "retired" from EY but was retained for four years as a part time "Senior Adviser". In March 2017 Malcolm was appointed as a non-executive Director of Fairstone Capital Investment limited. Malcolm frequently presents at industry conferences, contributes regular articles to the trade press and is a highly respected commentator on the issues facing the sector. When not working, Malcolm is a keen runner and cyclist which he claims mitigates the potential damage caused by his equally keen interest in wine and dining. He has recently written an (as yet unpublished) novel based on a global accountancy firm, sex, drugs, violence and money laundering. I have no idea if any of this will feature in his talk, but I know we're in for a treat!</p>	
Friday		Tea/Coffee 08:15 - Meeting Starts 08:30
 <p>Belden Menkus Managing Director MenKus & Associates</p>	<p><i>"Pensions: profits or purpose?"</i></p> <p>To kick start our Friday morning we are fortunate to have Belden Menkus to talk to us. Belden is the founder and Director of MenKus & Associates, a research and advisory firm that helps leaders fully activate their organisation's potential to succeed.</p> <p>Originally from the US, Belden started his consulting career with McKinsey & Co where he worked across a range of service and manufacturing industries. Subsequently, he was recruited by CSC Index to help create and deliver a breakthrough methodology using emerging technology to change organisational culture. After a variety of corporate development venturing and roles, Belden returned to management consulting in 2002. One of the topics that has caught his attention recently is the issue of organisational purpose - and how that fits with investor expectations. Belden's last talk at TPNW was on the subject of "design for speed" –and it was one of the most fascinating talks we've ever had at TPNW. I've no doubt his latest talk will be equally enthralling.</p>	



Damien Lardoux
Head of Impact Investing
EQ Investors

“Impact investing for a better future”

EQ is an award-winning chartered wealth management firm with over 60 staff in London and 2,000 clients all around the UK. Damien has managed EQ Investors Positive Impact Portfolios since their launch and leads their research on social and environmental impact. He brings an incredible enthusiasm for spreading the word about the benefits of impact investing presenting the case both for its financial and social benefits. He is a CFA charter holder, being a regular member of the CFA Institute and CFA UK society.

Before joining EQ Investors, Damien worked for Bank of America Merrill Lynch.

This promises to be a really interesting talk following on from our recent talks on ESG related topics.

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



Steven Baxter

Partner & Longevity Risk Consultant
Hymans Robertson



David Sinclair

Director
International Longevity Centre UK



Debora Price

Professor of Gerontology
University of Manchester



Joseph Lu

Director, Longevity Science
Legal & General

“The impact of changing longevity patterns on pensions and savings”

I will be moderating the panel session which is on a favourite subject of mine – the impact of increasing longevity. I read recently that quite remarkably “more years were added to human life expectancy in the twentieth century than were added across all prior millennia of human evolution combined.” The impact of changing longevity is profound and impacts on education, career planning, physical and mental wellbeing, relationships and of course pensions and savings. Although at the time of writing our panel is not yet complete the three panellists already confirmed are genuine experts in their field and will, I am sure, have plenty to say on this most challenging of subjects. We will confirm the remaining panellists shortly, but this is definitely a panel session not to miss.

Lunch 13:30

Depart

Places are bound to go quickly so please book early via enquiries@the-net-work-meetings.com

We look forward to seeing you at the Woodlands Park Hotel in Cobham.

John Moret
Chairman
The-Pensions-Net-Work

Patricia McSherry
Managing Director
The Net-Work Meetings Limited

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