



The-Pensions-Net-Work



"Leading Thought in Long Term Savings"



14th & 15th March 2019

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 belated Happy New Year. As I write this I'm shivering as the temperature plunges to sub-zero – more than thirty degrees below the average temperature in Australia where I was fortunate enough to spend a large part of January. Whilst in Australia I heard a lot about the Royal Commission investigation into Misconduct in the Banking, Superannuation and Financial Services Industry's – and it will be worth having a look at the report due out any day given the parallels with the UK's Financial Services industry. Our last meeting in 2018 was a huge success and I have every reason to believe the same will be true of our March meeting. Once again, the agenda includes a whole range of topical issues with a great list of expert speakers. The panel session on the implementing the pensions dashboard alone is a reason for attending – so do book early. I look forward to seeing you at the Woodlands Hotel in March.</p>	
Thursday, 17.35 - 19.00		
 <p>Trevor Cheal Director Spire Platform Solutions</p>	<p>"Back to the Future"</p> <p>Our first speaker for 2019 is Trevor Cheal. Trevor has over 30 years' experience in the personal financial services sector with executive experience in product development, business development and business strategy. Trevor is a Non-Executive Director at the Wealth Manager Rowan Dartington and has historically worked at both Prudential and Legal & General, holding a number of board positions in their Unit Trust & ISA companies as well as Prudential International. Trevor will be telling us a little bit about his latest venture with Spire PS whose aim is to modernise products and services to make them meaningful, relevant and appropriate for today, not yesterday. It should make for a fascinating start to our meeting.</p>	
Drinks at the Bar 19:00 - Dinner 19:30		
 <p>Ian Henderson CEO AML</p>	<p>"The Big Exchange"</p> <p>We decided to defer the after dinner "Life after Brexit" talk and discussions for obvious reasons. Instead I'm delighted to introduce Ian Henderson, CEO of the financial marketing agency AML. Ian's going to talking about a new and very different initiative that he's involved with called the Big Exchange which has some very heavyweight backing from a number of big financial institutions working alongside The Big Issue. It aims to bring retail investment opportunities to the financially-excluded using a technology platform. It's an entirely digital proposition making use amongst other things of blockchain technology. It promises to be a really interesting after dinner talk and discussion –don't miss it.</p>	

Friday		Tea/Coffee 08:15 - Meeting Starts 08:30
  <p>Adrian Boulding Director of Policy NOW:Pensions</p> <p>Jon Millidge Chief Risk and Governance Officer Royal Mail</p>	<p>"CDC – fact or fiction?"</p> <p>To update us on collective defined contribution schemes (CDCs) we have two speakers with potentially different perspectives on this subject. The government's consultation on their proposals as to how a particular form of CDC scheme might work in the UK, and the legislative and regulatory regime that would be needed to support any such scheme has just closed so the timing couldn't be better. Adrian Boulding needs no introduction and, on this occasion, will be wearing his NOW Pensions hat. I'm delighted that Jon Millidge from Royal Mail is able to join us. In 2018 Royal Mail reached an agreement with the Communication Workers Union to set up a collective scheme for its employees. They want to see CDC become a reality in the UK and are hoping that the required legislation will be introduced at the earliest opportunity. This is a session not to be missed.</p>	



Tish Hanifan
 Founder and Joint Chair
 SOLLA

“Advising Older Clients: Key considerations around Later Life”

It’s been a while since we looked at the issues facing the later life sector including the provision of advice and there’s no one better able to provide an overview on this hugely important area than Tish Hanifan from the Society of Later Life Advisers. As part of her overview of this sector Tish will be looking at the thorny subject of care funding and how that can involve issues around pension planning. She will also be considering the very topical and important subject of vulnerability which is an area of particular FCA area interest. Again, this is timely given the recent FCA Policy Statement (PS19/1) and consultation paper (CP19/5) linked to their Retirement Outcomes Review. Another session of huge relevance and importance.

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

Mark McDonnell	Chris Curry	Julie Gillis	Anthony Rafferty	Michelle Cracknell	Chris Connelly
Director	Director	Programme Director	Managing Director	Ex-CEO	Propositions & Solutions Director
ITM Ltd	PPI	DWP	Origo Services Ltd	TPAS	Equiniti

“Delivering the Pensions Dashboard”

Finally, to round off our meeting we have another panel session on a very topical subject. Our panel sessions have proved very popular and I am sure this one will be no different. We seem to have been talking about the Pensions Dashboard for decades but finally we are reaching the point where there are plans for it to become a reality. There is a lot of activity in this space right now with the DWP consultation paper on “Pensions Dashboards: Working together for the consumer” having just closed and with the government indicating that it sees a role for the SFGB to convene and oversee an industry delivery group to enable successful implementation. Under this model it is expected that the SFGB will appoint an independent chair who will bring together a range of key players from industry, FinTech and consumer organisations in a similar approach to Open Banking. Our panel session will be moderated by Mark McDonnell from ITM an organisation who have had an active role in the Dashboard space to date. Our panel brings together experts from a range of disciplines to examine all the challenges posed by this very important piece of work. Guy Opperman the Minister for Pensions and Financial Inclusion said in introduction to the consultation paper that “over time, industry led pension dashboards will transform retirement savings and pensions forever.” Whether we agree with that or not now is the time to find out more about how this initiative might achieve that objective. I am sure this session will be of enormous interest so don’t delay in booking your place.

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.

John Moret
 Chair
The-Pensions-Net-Work

Patricia McSherry
 Director
The-Pensions-Net-Work

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