

# The-Pensions-Net-Work

*"Leading Thought in Long Term Savings"*



**6<sup>th</sup> & 7<sup>th</sup> September 2018**

**Pendley Manor Hotel, Cow Lane, Tring, Hertfordshire HP23 5QY**



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

Welcome to the agenda for our third meeting of 2018. Those of you who were fortunate enough to attend our June meeting will know what a great event it turned out to be with some terrific talks – my favourite was Belden Menkus talking about “Design for Speed”- on a wide range of subjects and an excellent panel session. The only let down was the rather disappointing football match that we chose to show! The agenda for our September meeting is not quite complete but it’s already shaping up to be another fascinating event with talks on a wide range of topical subjects – not to mention what I am sure will be a really entertaining after dinner talk. We had a full house in June and I am sure we can manage the same in Tring in September. Hope to see you there.

**Thursday, 17.35 - 19.00**



**Andrew Baker**  
Partner  
NMG Group

***“Shock news: platform consumers satisfied (for now at least)”***

To kick the meeting off I’m delighted to welcome Andrew Baker from NMG. NMG performed the consumer research stream for the recently published FCA Platform Study and Andrew will be sharing some of the research findings with us – along no doubt with some more general commentary on the implications. NMG also have some new work on vertical integration that they plan to release after the summer and Andrew will also give us a taste of those findings.

Andrew’s career has been spent across Australia, Europe, and South Africa, specialising in strategy and market-facing capabilities. He has worked across most parts of the industry including wealth management (pension funds, platforms, and advice), asset management, and protection. This should be a really great start to our proceedings and it would be best to arrive in good time.

**Thursday, after dinner**



**Robin Ellison**  
Head of Strategic Development for  
Pensions  
Pinsent Masons

***“How do we explain pensions to politicians?”***

For our after dinner talk I’m delighted to welcome back someone who needs no introduction. Robin is a good friend and long-time supporter of TPNW and is a member of our advisory board. In addition to being an accredited mediator, Robin is a non-executive director for a number of companies and trustee of several pension funds. He is Visiting Professor in Pensions Law at the Cass Business School at City University and Visiting Senior Lecturer at Kings College London. Recently Robin’s been heavily involved in the long running and contentious saga of the Carillion Pension Scheme where he is Chair of Trustees. Robin won our tenth anniversary decanter for the best after dinner speaker so I’m sure we’ll be in for a treat whatever Robin chooses to talk about. Don’t miss it.

**Friday, 08.35 – 09:40**



**John Lawson**  
Head of Financial Research  
Aviva

***“Developing the science of income withdrawal”***

John is someone else who needs no introduction. John has been at Aviva now for over five years having previously been at Standard Life for more than ten years where he was Head of Pensions Policy. A frequent media commentator and influencer John is known for his wide ranging technical knowledge, strong views and excellent communication skills. At the moment Aviva are building a model for sustainable withdrawal strategies and John is expecting to be able to share some interesting insights with us. Highly topical and a great follow on from our panel session in June this should be a great way to get things moving on Friday morning.



**Carolyn Jones**  
Head of Pensions Product  
Fidelity International

***“Engagement and behaviours in retirement saving”***

Carolyn Jones has spent over 20 years working in the pension industry. She started her career with an actuarial company and realising the actuarial life was not for her moved to an in-house role with British Airways Pensions. After 6 years of consulting with PwC focusing on strategy and change management she moved to Fidelity International to work in proposition design and management. Carolyn is currently Head of Pensions Product at Fidelity International, and is responsible for the development of Fidelity’s pension and retirement products and services in the UK. Her and her team are also responsible for helping define Fidelity's pension policy and retirement thought leadership in the UK, and with colleagues around the globe to provide fresh insight into the ever more complex issues their customers face in saving for and living in retirement. She'll be drawing on their US experience for this session which I am sure will be thought provoking and link well with other sessions.



**Anna Sofat**  
Founder & MD  
Addidi

***“Women and finance especially pensions.”***

I’m delighted to welcome Anna Sofat to TPNW to talk on a subject which is too often overlooked when putting pensions conference programmes and agendas together. Anna is founder and Managing Director of Addidi and is a highly qualified and experienced wealth adviser. She has 20 years’ experience of advising private clients and managing financial advisory firms. Prior to founding Addidi, Anna was the Managing Director of Fiona Price & Partners, the first business set up specifically to provide financial advice for women by women. In 2012, 2013 and 2014, she was nominated one of the Top 100 Advisers by the New Model Adviser magazine and in 2014, she won the Financial Adviser of the year Media Award from Unbiased.co.uk. Anna’s passion is to create a “beautiful” practice which enriches the lives of its clients and staff alike. This has all the makings of a fascinating session.



**Calum Cooper**  
Partner  
Hymans Robertson

***“Forging a better future for DB – is consolidation the answer?”***

For our final session on Friday morning we welcome back Calum Cooper who spoke earlier this year at our pilot Edinburgh event on the same subject. I found his talk fascinating and felt it was worthy of a larger audience. Calum is an actuary with 15 years of experience in pensions. Consolidation of the UKs DB schemes’ £2.3trn liabilities is a hot topic. But should it be a top priority? Calum, who is an actuary at Hymans Robertson advising companies and trustees on pensions strategy and risk management, will show how, for the majority of DB schemes, whether or not you take action to consolidate is not life threatening. But given that cash funding needs could increase by £400bn in just 12 months, all that could change. Calum will share his views on what the priorities should be for DB schemes to deliver members’ pensions with more certainty and stability and the role that emerging PLSA-like superfund consolidators that exchange covenant for cash may play. Both topical and likely to provoke discussion.

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 Pendley Manor

John Moret  
Chair  
The-Pensions-Net-Work

Patricia McSherry  
Director  
The-Pensions-Net-Work

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