

The-Pensions-Net-Work

"Leading Thought in Long Term Savings"



22nd & 23rd February 2018

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

Thursday

Tea/Coffee 17:00 - Meeting Starts 17:30



John Moret
Chairman
The-Pensions-Net-Work

Hi and welcome to the agenda for our first meeting of 2018 – a little earlier in the year than has been the case in recent years. We had an incredible year in 2017 with some absolutely top-notch speakers and lots of thought provoking discussion and debate – so thanks to all who contributed.

We kick off 2018 with a bit of a theme running through most of the talks linked to technology. That's not really a surprise given the growing importance of FinTech to virtually all businesses operating in the world of pensions and financial services. We have another great line up of speakers and we finish off the meeting with what looks to be a terrific panel session on the future plans and role of the pensions dashboard. The panel sessions that we introduced last year proved to be very successful and I've no reason to doubt this will be any different. So as usual the message is book early if you want to ensure a place. I hope to see you in February.

Thursday, 17.35 - 19.00



Simon Binney
Business Development Director
Wealth Wizards

"Smart Platforms"

For our first talk of 2018 I'm delighted to welcome Simon Binney from Wealth Wizards representing one of our sponsors LV=. In an ambitious strategic move LV= took a majority stake in Wealth Wizards in 2015 injecting development capital into the award-winning Wealth Wizards business to allow the company to deliver on its ambition to develop a widely available 'white-label' automated advice platform. Simon has spent 20 years driving the development of enabling, integrated workplace technology and communications solutions to continually drive education, engagement and participation for employees. The digital advice market is now evolving at a rapid pace and Simon's talk should bring us up to date on the latest developments from one of the pioneering companies in this space. It should be a great start to the meeting.

Thursday, after dinner



Samantha Seaton
CEO
Moneyhub

"What Open Banking means for the pensions industry"

Keeping the technology theme going it's a huge pleasure to welcome Samantha (Sam) Seaton the CEO of Moneyhub as our after-dinner speaker. Moneyhub are an ambitious start-up business with the vision of creating a personal finance app that enables individuals to securely manage their money and take control of their finances. Moneyhub operates in one of the most exciting and fast-moving areas of the Fintech space – Open Banking. According to Sam "Open banking provides the opportunity to help customers make better financial decisions and increase their ability to save and optimise spending". But it is also very relevant to EBCs, Advisers, Life offices, Platforms and Asset managers. 2018 is a busy period in this world with the impact of PSD2 and GDPR –topics which I am sure Sam will mention. Sam has been CEO at Moneyhub since September 2016 and has previous experience with eValue and Towers Watson. I am confident this will be another lively and very interesting after dinner session.

Friday

Tea/Coffee 08:15 - Meeting Starts 08:30



Heather Hopkins
Founder & MD
NextWealth

"The outlook for the Platform Market: IPOs, Scalability and Fees Pressure"

For our first talk on Friday we are indebted to Heather Hopkins who is talking in place of the previously advertised speaker Mark Sanderson from Praemium as he is no longer available for our meeting. Heather has worked in the field of market research, competitive intelligence and industry benchmarking for two decades in North America, Asia and Europe. Heather has spent most of her career in financial services helping asset managers, platforms and financial advisers improve their propositions, customer communication and to benchmark success against competitors. Until recently she was Head of Platform and has also worked in digital marketing at Hitwise and Econsultancy. She recently set up NextWealth a research business that helps firms to see what's next in wealth. Her areas of expertise include customer behaviour, distribution strategy and data analytics and her talk should complement the Thursday evening talks from Simon Binney and Sam Seaton. This should make for a great start to Friday morning.



Jamie Jenkins
Head of Pensions Strategy
Standard Life Assurance

“Auto-enrolment –what next?”

Jamie Jenkins needs no introduction – he spoke at TPNW in June 2016. More recently Jamie was one of the three industry experts who participated in the DWP review of auto-enrolment which was published just before Christmas. Jamie chaired the strand of work that considered ways of improving the coverage of auto-enrolment but in this he’ll look at all three strands of work including contribution levels and engagement. He’ll consider the three strategic problems for the future development of auto-enrolment that are identified in the report including the thorny question of the self-employed and look at the next steps that are proposed in the review. This is a very timely talk on a topic of great significance for all involved with pensions –and it will also be a useful precursor to the panel session that follows.

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



Adrian Boulding
Director of Policy
NOW: Pensions



Kay Ingram
Director of Public Policy
LEBC



Duncan Howorth
Executive Chairman
ITM



Joe Stacey
Private Pensions Policy Advice and Guidance
DWP



Rob Yuille
Director of Retirement Policy
ABI



Tom Selby
Senior Analyst
A J Bell

“The Pensions Dashboard”

To round off the meeting we have another panel session on the very topical subject of the Pensions Dashboard. The pensions dashboard is one of the most ambitious engagement projects that the pensions industry has ever undertaken. Following a recommendation from the Financial Advice Market Review in March 2016, the creation of a pensions dashboard became government policy in the Spring Budget of that year. In September 2016 HMT challenged industry to create a prototype dashboard by Spring 2017 and implement the policy by 2019. A cross industry group was set up to build a prototype dashboard which was delivered in Spring 2017. With some uncertainty over future funding there was speculation that the initiative might fail but in October 2017 the Pensions Minister announced that responsibility the taking the dashboard forward was to revert to DWP. We have a great panel of experts drawn from across the industry each of whom will give their perspective on the challenges that lie ahead, the potential uses and benefits and the likelihood of success –following which there will be time for discussion and debate. The two-hour session will be moderated by Adrian Boulding who needs no introduction to TPNW and I feel sure will find time to input his own views. Definitely a session not to miss – nor to leave early.

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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