

The-Pensions-Net-Work

"Leading Thought in Long Term Savings"



29th & 30th June 2017

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



John Moret
Chair
The-Pensions-Net-Work

Hi all and apologies for the delay in providing details of our June meeting agenda. As you are probably aware we had to change the date of this meeting to avoid a clash with another event where details were provided at very short notice! But I am delighted to say that despite having to replace a number of our speakers we still have a great line up and as usual a wide ranging agenda. Our March meeting may be difficult to beat in terms of the quality of the speakers and the audience numbers and importantly the excellent participation and debate. But with the topics on the June agenda I feel sure we'll have some excellent and stimulating discussion – and by the time of the meeting we will of course know the outcome of the election and maybe have a better sense of what the pensions and long term savings landscape will look like. I need to apologise as I will be missing on the Thursday evening as I had a prior concert engagement at Wembley. Adrian Boulding has kindly agreed to deputise and all being well I will be in the chair for Friday's talks. I hope you can make the new dates and look forward to seeing you at the excellent summer venue at Audley's Wood.

Thursday, 17.35 - 19.00



Joanna Hall
Head of FS Consulting
North Highland UK

"The future is digital"

To kick off our meeting I'm delighted to welcome back Joanna Hall. Joanna spoke at TPNW back in 2012 alongside her colleague Bruce Moss when she was at eValue FE. Since then Joanna has moved to North Highland UK where she is Head of Financial Services Consulting. There she has worked with many global companies on customer experience improvement programmes involving digital and technology design and delivery. Previously Joanna has worked CSC, Tillinghast, EY and Bacon & Woodrow to name but a few.

The background to this talk is an article that I read by Joanna which appeared in Corporate Adviser in June 2016 and which suggested that the great financial services shake up is coming and that some well known providers might completely disappear in the next five years. This should make for a very lively start to our meeting.

Thursday, after dinner



Adrian Boulding
Director of Retirement Planning
Dunstan Thomas

"Engaging with millennials - Lifetime ISA and other stories"

There's no escaping Mr Boulding at this meeting! Wearing one of his many hats –this time representing Dunstan Thomas - Adrian is going to help stimulate some after dinner discussion by sharing the results of a survey that Dunstan Thomas recently conducted of millennial savers with a specific focus on what LISA will bring to the market. The savings needs of millennials are likely to become increasingly important over the next few years and spending some time looking at these needs in more detail seems very appropriate. In a break from our traditional after dinner sessions Adrian will be including some Vox pop videos which should lead to a lively end to the evening.

Friday, 08.35 – 09:40



Malcolm Kerr
Senior Adviser
EY

"Where are we now?"

Malcolm is making his third appearance at TPNW – the last one was in 2014 and will be well known to many of you. With decades of experience of the world of financial services and the long term savings industry Malcolm's views are always of interest. He has worked in the financial services industry for almost 45 years, and has held senior roles at firms including Canada Life, MetLife and Albany International. Now on the glide path to retirement Malcom continues to work as a senior adviser to EY and recently became a non-executive director of consolidator Fairstone. Malcolm also continues to write a regular column for Money Marketing. I've no doubt Malcolm's talk will be just as thought provoking as his previous sessions at TPNW.



Phil Green
Chair
Royal London IGC

“The role of and issues facing IGCs”

For some time I’ve been hoping to get someone to talk to us about IGCs. Therefore I am delighted to welcome Phil Green for our second talk on Friday. Phil was appointed Chair of Royal London’s IGC in February 2015 and is currently a non-executive director and deputy chairman of Wesleyan Assurance Society. Previously he headed up LIMRA in Europe, the Middle East and Africa. Prior to that he worked for AIG for several years having started his working career with Sun Life of Canada in 1980. This should be a very relevant and topical talk for all attendees.



Andy Tarrant
Head of Policy &
Government
Relations
The People’s
Pension



Gregg McClymont
Head of
Retirement
Savings
Aberdeen Asset
Management

“DC around the world –the good, the bad and the ugly”

Gregg needs no introduction having spoken to us in November 2015 shortly after he left parliament and his role as shadow pensions minister following the 2015 election. Andy Tarrant was senior parliamentary assistant to Gregg from 2010-2015 and previously worked in the Labour party press office. Prior to that he had worked for BT, including a 2 year stint in Brussels, OfTel and Herbert Smith where he trained to be a solicitor. Gregg and Andy recently co-authored a book “Towards a New Pensions Settlement” which looked at the experiences of pensions reform in 7 countries including the UK. I suspect their talk will draw on some their findings in the book. It promises to be a fascinating session.



Iain Anderson
Executive Chairman
Cicero Group

“Political Risk - Measuring it?”

Iain is an expert in public policy and complex corporate communications issues. He spoke to us after the last general election in 2015 and provided some fascinating insights. Iain has worked for a range of UK politicians. He was part of the founding team at Cicero Group and focuses on public policy and corporate communications strategy in Europe and North America. He regularly contributes to national and international print and broadcast media including Sky News and BBC. Iain is also contributing Political Editor at Square Mile magazine. He was ranked in the top quartile of the Total Politics Top 100 Lobbyists and CityAM includes him in the list of “The City’s most influential financial PRs”. With the election possibly providing a clearer political landscape Iain’s comments will once again be timely and apposite. A great way to round off the meeting.

So once again we have some really interesting subject matter alongside some great speakers. Put those alongside the delightful location at Audley’s Wood and the scene is set for another great networking event.

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

We look forward to seeing you in Basingstoke at the end of June.

John Moret
Chair
The-Pensions-Net-Work

Patricia McSherry
Director
The-Pensions-Net-Work

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