



# The-Pensions-Net-Work

*"Leading Thought in Long Term Savings"*

**16<sup>th</sup> & 17<sup>th</sup> November 2017**

**Hilton St. Anne's Manor, London Road, Wokingham RG40 1ST**

**Thursday**

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



**John Moret**  
Chairman

The-Pensions-Net-Work

A very warm welcome to the detailed agenda for our final meeting of 2017. The time seems to have flown by since we met for the first time in March this year. In the three meetings that we've held I have been truly amazed at the quality and content of the presentations that we've been privileged to enjoy. Those who attended our last meeting in Tring were treated to a fantastic and very humorous after dinner talk by Steve Bee (I've checked out that a trillion seconds equates to 31,709.8 years!). But all the talks at the meeting were exceptionally good and many of you actually said it was the best meeting you had attended. So, the bar has been set quite high for those down to entertain us in November. But I am sure they won't let us down. We are just so fortunate to have so many interesting people willing to give up their time to talk to us. Don't put off booking because the November meeting is always popular – last year we had to turn people away. I look forward to seeing you in Wokingham.

**Thursday, 17.35 - 19.00**



**Jon Dean**

Head of Retirement Strategy  
Altus

***"Regulation is eating the world - how RegTech is changing the face of compliance"***

We kick things off with one of our sponsor's sessions. Jon Dean is Head of Retirement Strategy at Altus Consulting. Jon's talk will examine the challenges faced by providers and their administrators to stay up to date with the inexorable rise in financial regulation, before moving on to look at how regulatory technology, or 'RegTech', is helping reduce the burden on firms. Finally, Jon will explore how the next generation of emerging technology will transform the industry and the very way it is regulated.

RegTech has taken off since former UK chancellor George Osborne mentioned it in a budget speech promising to support "new technologies to facilitate the delivery of regulatory requirements" to the financial services sector. Jon spent his early career developing and implementing administration software for company pension schemes, before eventually specialising in data migrations for life companies. After a brief spell training as a stonemason, Jon returned to the world of pensions. He now consults on a range of strategic and operational issues across retail platforms, life companies and trust-based scheme administrators. This should be a really interesting and forward looking start to our meeting.

**Thursday, after dinner**



**Ashok Gupta**  
Chairman







PLSA DB Taskforce

***"Fixing an antiquated DB sector"***

As our after-dinner speaker I'm delighted to welcome Ashok Gupta who will be known to many of you. An actuary by training Ashok divides his time between directorships and entrepreneurial activities. He chairs AA Insurance Services and eValue Investment Solutions. Ashok's non-executive directorships include New Ireland Assurance and JP Morgan European Smaller Companies Trust. He is also a member of the FRC Codes and Standards Committee and Actuarial Council. More recently he led the PLSA taskforce on funded DB schemes so it is no surprise that he has chosen this topic as the theme for his after-dinner talk which will look at issues such as the pressures on the DB sector, scheme consolidation and the case for change. This should be both topical and challenging – a great recipe for an after-dinner talk!

**Friday**

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

 <p><b>Philip Brown</b> Head of Policy, LV=</p>	 <p><b>Billy Burrows</b> Retirement Director, Better Retirement Group</p>	 <p><b>John Lawson</b> Head of Financial Research, Aviva</p>	 <p><b>Tom McPhail</b> Head of Pensions Research, Hargreaves Lansdown</p>	 <p><b>Sarah Luheshi</b> Deputy Director, Pensions Policy Institute</p>	 <p><b>Neil Collins</b> Principal Regulatory Consultant, Huntswood</p>
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**“Optimising Retirement Outcomes”**

We kick off Friday with a double header panel session which will be moderated by Phil Brown from LV= our other sponsors. We’ve assembled an awesome line up of panellists who need little or no introduction. Billy Burrows has been working as an adviser in the world of retirement options for over 5 years and has a wealth of knowledge of the subject matter. John Lawson from Aviva also has years of experience in the pensions technical and strategy arenas and will be representing product providers. Tom McPhail is one of the most high profile and well-known figures in the world of life and pensions and will bring another perspective on behalf of direct distributors. Regrettably the FCA have been unable to field a speaker but I am delighted that Neil Collins (Principal Regulatory Consultant at Huntswood) will be joining the panel to contribute from a regulatory perspective. I am also very pleased that Sarah Luheshi from the Pensions Policy Institute is able to join us – she will be aiming to represent the voice of the customer. This should be a fantastic session and one definitely not to miss.



**James Daley**  
Managing Director  
Fairer Finance

**“Restoring trust in financial services”**

To bring us back to reality after the panel session we’ll be joined by James Daley MD of Fairer Finance. James has been a consumer campaigner and financial journalist for more than 17 years. Before launching *Fairer Finance*, he worked for the consumer group, *Which?* where he campaigned for a better deal for customers of banks and insurers in the wake of the financial crisis.

James is frequently interviewed on national television and radio, and has regularly appeared on shows such as *Watchdog*, *Rip-off Britain*, *Dispatches* and *Supersoppers*. Before working at *Which?*, James spent 10 years as a business and finance newspaper journalist, latterly as *The Independent’s* personal finance editor and cycling columnist!



**Natanje Holt**  
Business Development Manager  
Bravura

**“The future of work and the implications for the Financial Services Industry”**

Finally, to bring our talks for 2017 to an end Natanje Holt a member of TPNW’s Advisory Board and Business Development Manager for Bravura will be sharing some findings and thoughts from the excellent report published earlier this year by Bravura titled “Workplace Megatrends”. Natanje needs no introduction having been a regular attendee and supporter of TPNW over many years. She joined Bravura from Dunstan Thomas where she was MD just over a year ago. For those unfamiliar with the Bravura report it deals with such diverse topics as income uncertainty, the human cloud, the ageless culture and the role and power of government. This should be a genuine look into the future and a brilliant way to round off the year.

Places are bound to go quickly so please book early via [enquiries@the-net-work-meetings.com](mailto:enquiries@the-net-work-meetings.com)

And don’t forget our first meeting of 2018 at the Woodlands Park Hotel in Cobham on 22/23 February.

We look forward to seeing you at the Hilton St. Anne’s Manor.

John Moret  
Chair  
The-Pensions-Net-Work

Patricia McSherry  
Director  
The-Pensions-Net-Work

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