



The-Pensions-Net-Work

"Leading Thought In The Employee Benefits Market"

7th & 8th March 2013

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



John Moret
Chair

The-Pensions-Net-Work

Our last meeting in November is now a distant memory but those of you who have visited the website recently will have seen once again some hugely positive feedback about the quality and variety of the talks. A big thank you again to all the speakers who contributed to what many felt was our best ever meeting. Maintaining the standard that we achieved in 2012 won't be easy but I've a feeling that 2013 may yet turn out to be an exceptional year for us. As I mentioned in November we are planning a special themed breakfast meeting sponsored by Legal & General on the topic "What makes a good pension?" We have already secured some high profile speakers and we will also be unveiling the results of some new consumer research undertaken specifically for TPNW. It should be a really exciting event. The date is Wednesday 15th May in London and I hope to unveil the full details and programme at the March meeting. Talking of which

I am delighted to say that once again we have a great line up of speakers and topics for the meeting which is again at the Woodlands Park Hotel in Cobham.

Thursday, 7th March 17.35 - 19.00



Niki Cleal
Director, PPI

"What is the potential impact of the Government's reforms to the public sector pensions?"

To kick things off I'm delighted to welcome back Niki Cleal from the PPI. Niki's going to provide an assessment of the potential impact of the Government's reforms to public sector pensions drawing on some research that the PPI have undertaken. With everything else that's been going on the public sector pension reforms have not had that much exposure recently so Niki's talk will provide a really useful update. Niki has also agreed to spend a few minutes talking about the state pension reforms – so this promises to be both a very topical and hugely informative start to the meeting.

Thursday, 7th March after dinner



Vivi Friedgut
Director, Blackbullion

"Creating a money smarter Britain - from the bottom up!"

After dinner on Thursday I'm delighted to welcome Vivi Friedgut director of Blackbullion. I can do no better than quote from our esteemed Board Member Henry Tapper's recent blog.

"If you haven't come across Vivi or her work, let me explain; Vivi and I met in a City over a large pair of aubergines. She explained she'd jacked in her job advising the super-rich to work with students under the sponsorship of universities with funds and pastoral intent.

Vivi is a force of nature, of Generation Y but able to mix it with everyone from the Prime Minister down. The number of times I've been in a recent conversation that opens "I've been speaking to a friend of yours Vivi Friedgut..." Vivi has recently published a book "Money Smarter – a Family Guide" which apparently is close to breaking into Amazon's top 100 best sellers. It's about getting kids into good financial habits called and I suspect this will form at least part of her talk to us. It should be hugely enjoyable.

Friday, 8th March 09.05 – 10.20



Jonathan Camfield
Partner, Lane Clark & Peacock
LLP

"European Pensions Directive: annoyance or annihilation?"

On Friday morning we start with a look at the European Pensions Directive. Leading this session will be Jonathan Camfield Partner at Lane Clark and Peacock. Jonathan is a colleague of our own Emma Watkins and comes highly recommended. We've looked at some aspects of European legislation in some recent talks but this will be a great opportunity to discover just how serious a threat the Directive poses.

Friday, 8th March 10.35 – 11.45



Philip Hollingdale
Founder and CEO, Staffcare

“How has auto-enrolment changed the competitive landscape for platforms?”

Following on from Jonathan’s talk we return to the subject of auto-enrolment – it’s hard to ignore it. I’m delighted to welcome Phil Hollingdale Founder and CEO of Staffcare one of the leading software providers for reward communication, auto-enrolment and benefits administration. Staffcare is a rapidly developing technology company and Phil will be talking about how auto-enrolment has changed the competitive landscape for platforms. This should be a really useful follow on from the talks given last year at TPNW by Steve Bee and Holly Mackay. Definitely not to be missed.

Friday, 8th March 11.45 - 13.00



Craig Phillips
Principal,
Coredata Research



John Porteous
Head of Wealth
Management,
RSM Tenon

“The Shifting Role of Financial Advisers: RDR and Beyond”

We finish the morning with another very topical subject – the Retail Distribution Review. We will be welcoming back Craig Phillips of Coredata Research who will talk us through some extensive research that his firm has undertaken which looks at the shifting role of advisers post RDR.

To provide some first-hand comment on the research and to provide an insight into the direction of travel for one major advisory firm I am also very pleased to welcome John Porteous Head of Wealth Management at RSM Tenon. John joined the firm about 18 months ago with the specific brief of getting then ready for the post – RDR world and I am sure he will have some interesting views to express based on his experience and knowledge.

Friday, 8th March 14.00 – 15.15

Facilitated discussion led by



Adrian Boulding
Pensions Strategy Director,
Legal & General

“An early contribution to the OFT DC Workplace Pensions Market Study”

And to close proceedings after lunch we are repeating the very successful experiment we undertook last year which saw Adrian Boulding facilitate a discussion about a current consultation document. Following that session we were able to craft a very perceptive response which was sent to the NAPF and which apparently figured several times in their subsequent discussions. This time Adrian has chosen another very contentious consultation paper – the OFT DC Workplace Pensions Market Study. We will be circulating a briefing paper to those attending the meeting a little nearer the time so that you can come prepared and to help make the discussion as constructive as possible. This session will be an early opportunity for members of The-Pensions-Net-Work to debate the issues and provide a steer for OFT. We plan to submit the afternoon’s output to OFT under the banner of TPNW – and possibly also attract some press coverage although of course we will not ascribe comments to individuals nor identify the organisations they come from.

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