

The-Pensions-Net-Work

"Leading Thought In The Employee Benefits Market"



26th & 27th September 2013

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



John Moret
Chair, The-Pensions-Net-Work

Welcome to the agenda for our autumn meeting. As I write these notes the temperature is approaching 30 degrees and the long awaited hot summer has finally arrived. It's been a summer of great British sporting success and just after our last meeting my wife & I were lucky enough to be on Centre Court to watch Andy Murray end that 77 year gap since we last had a mens singles champion – it was a truly memorable experience.

Our last meeting also prompts some fond memories and once again the feedback was really positive. Looking at our forthcoming programme we have arguably one of the strongest speaker line ups in my time as chair. It's also a very diverse programme which should have wide appeal and I'm genuinely looking forward to it. For the first time we are experimenting with a new format to Friday with a slightly earlier start so that all four talks can be accommodated before lunch – allowing delegates to get away a little earlier.

I feel sure places will be in demand so once again I urge you to book early –and why not recommend the programme and TPNW to other business colleagues and associates. And just to remind you again that if you have any ideas for future speakers or topics Patricia or I will be very pleased to receive them.

Thursday, 26th September 17.35 - 19.00

"The growth of and requirements for success in the D2C investments market"



Robert Hudson
Head of Charles Stanley Direct

The programme is kicked off by what I am sure will be a fascinating talk by Rob Hudson. I've known Rob for many years and his knowledge and experience of platforms aimed particularly at the D2C market is second to none. He's been looking to build a proposition that might actually compete successfully with Hargreaves Lansdown and it looks as though Charles Stanley Direct may well provide him with the opportunity. It should be a really interesting session so don't be late.

Thursday, 26th September after dinner

"Pensions through the looking glass"



Malcolm McLean, OBE
Consultant, Barnett Waddingham LLP

Our after dinner speaker really needs little introduction. Malcolm McLean OBE has been a key figure in the pensions industry for many years. Having spent many years as CEO of The Pensions Advisory Service where he had a very high profile he joined Barnett Waddingham as a Consultant in April 2010. He has a wealth of experience and is a popular and accomplished speaker –and continues to appear regularly on our TV screens and on the radio. I know he will provide a fascinating and entertaining perspective on the pensions industry.

Friday, 27th September 08.35 – 09:40

"Capitalism without bankers – the easy solution to the pensions crisis"



David Hargreaves
Founder, The Pension School

We star Friday morning with a talk from David Hargreaves the founder of the Pensions School. An actuary with experience at Pensions First, Hewitts and PWC and specialisms in investments and marketing David established The Pensions School in 2009 with the aim of enabling employers to cost effectively educate their entire workforce on pensions, savings and life insurance matters! The title for David's talk is taken from his book "Capitalism without bankers – from austerity to prosperity". It should be a stimulating start to Friday's proceedings.



Dan Ryan

Head Life & Health R&D | Managing Director | Group Underwriting, Swiss Re

“How new sources of data are enhancing our views on future longevity”

Following on from David I am delighted that Dan Ryan from Swiss Re is able to join us. The issues associated with increasing longevity are a recurring theme in most of our meetings and Dan will be looking at how longevity forecasts and projections are being improved through the collection of new sources of underwriting and other data. Again this should be a fascinating and very topical talk.



Melanie Cusack
Client Director, PTL

“DC Governance. A View From The Frontier”

As our penultimate speaker I am pleased to welcome Melanie Cusack from PTL (formally Pitman Trustees Ltd.) She will be talking about another hugely relevant and topical issue – DC Governance. PTL are a leading professional independent trustee specializing in defined benefit, defined contribution and contract based pension schemes. Melanie is a qualified pensions actuary and has worked in the pensions industry since 1988 addressing both statutory and non-statutory actuarial and non-actuarial aspects of UK occupational pension schemes. She joined PTL from Towers Perrin in 2009 and I’m sure will have some fascinating observations on this very contentious issue.



Caroline Rookes, CBE
Chief Executive, Money Advice Service

“Piggy banks to pension pots: developing a new UK Financial Capability Strategy”

Our final speaker is someone who is at the forefront of the crucial financial capability discussion and debate. Caroline Rookes took over as CEO of The Money Advice Service earlier this year. Faced with some significant challenges Caroline has been engaging with all parts of the industry as she looks to lead the development of a new consultation and developing Strategy on Financial Capability. Prior to her appointment at MAS Caroline was Director of Private Pensions at the Department for Work and Pensions (DWP) where she oversaw the introduction of auto-enrolment and the new NEST pension scheme. She has also been responsible for the policy, legislation and regulation of the private pension regime and for its protection framework.

This session should provide a really fascinating end to our programme.

As I said above it’s a very topical and diverse programme with some real industry heavyweights prepared to give their time to the Network. I hope we get the full house that the speaker line up deserves.

Enjoy the rest of the summer and see you in September.
John Moret
Chair

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