



The Money Purchase Pensions Forum  
(A Division of the European Pension Fund Investment Forum)

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Meeting History

1997

- September** ***“An Overview of Money Purchase Investment Issues”***  
*Kevin Wesbroom*, Defined Contribution Services Unit, Bacon & Woodrow  
*Chris Erwin*, Defined Contribution Services Unit, Bacon & Woodrow  
*David Fry*, Pensions Director, Philips Pension Fund
- November** ***“Striving for Efficient Member Record Keeping - Improving the Practical Administration of Contribution Collection and Attribution”***  
*Nick Wheeler*, Marketing Director, Hartshead Solway Ltd.  
*John Hale*, Assistant General Manager, Equitable Life Assurance Society  
*Peter Booker*, Pensions Director, The Rank Group

In addition, members were also invited in December to the Christmas Reception and Open Forum held jointly with The Pension Fund Investment Forum and The Pension Trustees Circle.

1998

- January** ***“Communication Programs - Design and Implementation”***  
*Tony Eakins*, Managing Director, Triskel Communications Ltd  
*Bernard Jennings*, Director, Hogg Robinson Consulting Group  
*Ralph Turner*, Group Benefits Manager, EMAP PLC
- March** ***“Investment Decisions - Lifestyle or Member choice”***  
*Robert Fairbairn*, Director, Mercury Asset Management  
*Nigel Williams*, Director, Defined Contributions, Barclays Global Investors  
*Colin Monks*, Pensions Manager, Citibank
- May** ***“Risks and Responsibilities in Running a Money Purchase Pension Scheme”***  
*Dan Schaffer*, Partner, Freshfields  
*Andrew Dyson*, Head of UK Pension Investment Consulting, William M Mercer  
*David Barrow*, Director, Law Debenture Pensions Trust Corporation plc
- July** ***“Money Purchase Pension Schemes v. Group Personal Pensions”***  
*Mark Stewart*, Partner, Watson Wyatt Partners  
*Owen Sweetman*, DC Project Director, Sedgwick Noble Lowndes  
*Geof Pearson*, Pensions Manager, J Sainsbury plc
- September** ***“Publicly Quoted Investment Funds v. Individually Tailored Investment Vehicles”***  
*Bob Bridges*, Head of Business Development, Legal & General Investment  
*Kevin Wesbroom*, Head of DC Services, Bacon & Woodrow  
*Bill Baker*, Pensions Trust Manager, IBM (UK) Ltd.



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1998 cont.

**November**    ***“Bundled and Unbundled Options for Schemes: Making the Decision”***  
*Marc Hommel*, Managing Director, Liberty Pensions  
*Damon Watkins*, Head of Investment Services, Prudential Portfolio Managers  
*Michael McNerney*, Pensions Manager, Guardian Media Group plc

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1999

**January**    ***“Surveys and Trends – Just Where Are We going?”***  
*Colin Singer*, Consultant, Watson Wyatt Partners  
*Michael O’Brien*, Consultant, Towers Perrin  
*Chris Lewin*, Head of UK Pensions, Unilever plc

**March**        ***“The Green Paper, Stakeholder Pensions, LISA, the Budget and other Gov. Policy”***  
*Alan Pickering*, Vice-Chairman, NAPF  
*Paul Greenwood*, Head of Retirement Research Unit, William M Mercer  
*Dermot Courtier*, Head of Group Pensions Strategy, The Post Office

**May**            ***“Meet the Press and hear their views of the pension fund industry!”***  
*Fennell Betson*, Editor, IPE Investment & Pensions Europe  
*Peta Hodge*, Editor, Employee Benefits  
*Tom Powdrill*, Editor, Pensions Week

**July**            ***“Annuities: Current Problems, Possible Solutions and Other Issues”***  
*Neil Crighton*, Snr Manager Group Pensions Development, Equitable Life Assurance Society  
*Bernard Jennings*, Director, Entegria  
*Rosie Kumik*, Group Pensions Manager, News International

**September**    ***“Provisioning over the Earnings Cap: A look at some of the options available”***  
*Alan Judes*, Partner, Bacon & Woodrow  
*Stephen Cahill*, Senior Consultant, William M Mercer  
*Colin Grindle*, Head of Pensions, Lloyds TSB Group

**December**    ***“Additional Voluntary Contributions: An Update on Current Issues”***  
*Andy Cox*, Partner, Bacon & Woodrow  
*Andrew Gillies*, Head of Product Development, Prudential Portfolio Managers  
*Stewart Neil*, Chief Pensions Manager, Universities Superannuation Scheme



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### 2000

- January**     ***“Stakeholder Pensions Revisited – Planning Blight or Business as Usual”***  
*Adrian Boulding*, Pensions Strategy Director, Legal & General Assurance Society  
*Paul Greenwood*, Head of Retirement Research Unit, William M Mercer  
*Geof Pearson*, Pensions Manager, J Sainsbury plc
- March**       ***“Performance Issues for DC Pension Schemes”***  
*Robert Noach*, Head of Business Development, Liberty Pensions  
*Sarah Aitken*, Head of DC Unit, Mercury Asset Management  
*Julie Richards*, Head of Benefits, The Rank Group plc
- May**         ***“How to inform – Trends in the Benefit Statement Communication”***  
*Helen Mackenzie*, Pilot Manager, DSS Benefits Agency  
*Jerry Edmondson*, Human Capital Consultant, Watson Wyatt Worldwide  
*Phil Hickinson*, Pension Specialist, Cable & Wireless Pension Trustee
- July**         ***“How will we inform - Trends in Electronic Communication”***  
*Terry O’Malley*, Head of Sales and Marketing, Invesco Europe Limited  
*Peter White*, Business Development Manager, Capita Hartshead  
*Dianne Lloyd*, Pensions Communications Manager, IBM (UK) Ltd.
- September**   ***“Stakeholder Pensions - DC Scheme and Employer Responses”***  
*Steven Cameron*, Manager, Pensions Development, Scottish Equitable plc  
*Andy Cox*, Partner, Bacon & Woodrow  
*Colin Grindle*, Head of Pensions, Lloyds TSB Group
- November**    ***“Pensions Place in the Savings Spectrum”***  
*Roderic Rennison*, Director Distributor Funds Division, Merrill Lynch Investment Managers  
*Dick Strattan*, European Partner, William M Mercer Limited  
*Ralph Turner*, Group Benefits Manager, EMAP plc

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2001

January

***“Giving Financial Advice to Members”***

*Matthew Duckworth*, Client Relations Director, Nelson Investment Planning Ltd.  
*Tudor Taylor*, Director, Towry Law Plc  
*Alan Stone*, Group Pensions Manager, Philips Pension Fund

March

***“Pensions Splitting and Divorce – Implications for Schemes”***

*Vivien Cockerill*, Partner, Wragge & Co.  
*Ian McQuade*, Pension Operations Director, Capita Hartshead  
*David Barrow*, Director, The Law Debenture Pension Trust Corporation.

May

***“Communication Issues”***

*Shaun Murphy*, Head of Marketing & Communications, Fidelity Pensions Management  
*Nicola Cull*, Senior Communications Consultant, Watson Wyatt Worldwide

July

***“The Myners Report – Implications for DC Pension Schemes”***

*Kim Gubler*, Head of DC Research, Bacon & Woodrow  
*Nigel Taylor*, Head of Consultant Relationships, Phillips & Drew  
*Jane Kola*, Partner, Sacker & Partners

September

***“Investment Design – Contemporary Views on Default and Lifestyle Options”***

*Emma Douglas and Mark Stanley*, Co-Heads of DC Pensions, Zurich Scudder Investments Ltd.  
*Bob Bridges*, Head of Business Development, Legal & General  
*Steven White*, Senior Investment Consultant, Lane, Clark & Peacock

November

***“Investment Design - Strategies for Communicating Default and Lifestyle Options”***

*Ian Buchan*, Business Development Manager, Scottish Life Administration Services  
*Trevor Rutter*, Senior Communications Consultant, William M Mercer  
*Colin Monks*, Pensions Manager, Citigroup

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2002

January

***“Pensions Simplification”***

*Alan Pickering*, Partner, Watson Wyatt and Chairman, EFRP (European Federation for Retirement Provision)  
*Jocelyn Blackwell*, Managing Director, Dunnett Shaw and Partners

March

***“Pensions and Its Fit with Other Benefits”***

*Tim Roberts*, Managing Director, Talking People Research  
*Marcus Underhill*, Head of Flexible Benefits Consulting, William M Mercer  
*Alan Bowden*, Reward Systems Manager, Philips Electronics UK Limited



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Meeting History

2002 cont.

**May** ***“Meet the Press and Hear Their Views of the Pension Fund Industry”***

Matthew Craig, Editor, Pensions Management Magazine  
Stephanie Hawthorne, Editor, Pensions World  
Simon Targett, Editor FTfm

***“Investment Consultants – Do they add value?”***

Gillian Cook, Associate, Bacon & Woodrow  
David Butcher, Chief Executive, Invesco Pensions Ltd.  
Ken MacIntyre, UK Pensions Manager, Halliburton UK Limited

**July** ***“Myners in the DC Context – Does it work?”***

Andy Hunt, Senior Investment Consultant, Watson Wyatt  
David Pollard, Partner, Freshfields  
Penny Green, Chief Executive, SAUL Trustee Company

**September** ***Pitfalls of DC Schemes and How to Avoid Them***

Jane Fryer, Director, The Law Debenture Pension Trust Corporation plc;  
Lee Jagger, Principal Consultant, Hewitt Bacon & Woodrow

**November** ***Pensions Reform – Practical Implications for Trustees***

Alan Pickering, Partner Watson Wyatt  
Dick Strattan, European Partner, Mercer Human Resource Consulting

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2003

**January** ***What To Do with a Pot of Money at Retirement?***

Tudor Taylor, Managing Director, Wentworth Rose  
Adrian Boulding, Pensions Strategy Director, Legal & General  
Rosie Kumik, Group Pensions Manager, News International

**March** ***Death Benefit Discretions, Trusts and Ombudsman Rulings – Challenges for Trustees***

Jane Dale, Senior Associate, Freshfields Bruckhaus Deringer  
Vernon Holgate, Director, Thomas Eggar Trust Corporation Limited  
Michael Duncombe, Consultant, Royal Mail Pensions Trustees

2002 cont.



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Meeting History

2003 cont.

**May** ***Should Benchmarks be Strategic, Relative or Absolute (and can they relate to long-term projected cash flow)?***

*Eric Lambert*, Head of Client Consultancy, The WM Company  
*Alan Wilcock*, Research & Development Director, Russell/Mellon CAPS Ltd.  
*Michael O'Brien*, Managing Director, European Institutional Business, Barclays Global Investors

**July** ***Living with your investment Manager and what to do if you can't!***

*Phil Trevillion*, Director, Merrill Lynch Investment Managers  
*Glyn Ryland*, Partner, Wragge & Co  
*Gary Turner*, Associate, Hewitt Bacon & Woodrow

**September** **Branding & Communications – How to Roll Out a New Pension Scheme**

*Stuart Stephen*, Group Pensions Director, Barclays Bank  
*Alistair Drysdale*, Account Director, Church Advertising Agency  
*Tim Roberts*, Managing Director, Talking People

**November** **Do Trust based pension schemes still have an advantage over Contract based pension arrangements?**

*Nicholas Couldrey*, Partner, Sacker and Partners  
*Paul Murray*, National DC Pensions Manager, Standard Life Assurance Co.  
*David R. Barker*, Managing Consultant, Mercer Human Resource Consulting.

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2004

**January** **Saving Limit – Closer than you think**

*Peter Hopkins*, Team Leader, Pensions Simplification, Inland Revenue Capital Savings and Business Stream  
*James Pinnock*, Associate, Hewitt Bacon & Woodrow  
*Alan Pickering*, Partner, Watson Wyatt LLP

**March** **Overseas DC Experience – Lessons from US and Australia**

*Richard Parkin*, Head of DC Product Development, Fidelity Investments  
*Scott Donald*, Director of Product Development & Marketing – UK, Russell Investment Group  
*Gillian Cook*, Principal Consultant, Hewitt Bacon & Woodrow



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Meeting History

2004 cont.

May

**“The Investment Implications of The Pensions Bill”**

*Daniel Schaffer*, Partner, Freshfields Bruckhaus Deringer  
*Peter Brackett*, Investment Consultant, Watson Wyatt LLP  
*Crispin Southgate*, European Credit Strategist, Merrill Lynch

**“Preparing for April 2006”**

*Richard Lee*, Senior Associate, Wragge & Co  
*Kim Gubler*, Senior Partner, Kim Gubler Consulting  
*David Butcher*, Head of Corporate Affairs, INVESCO UK

July

**“The Challenge of Good Benefit Communication (including providing Combined Pension Forecasts)”**

*Stuart Heatley*, Sales & Marketing Director, Capita Hartshead  
*Colin Fowler*, Pensions Operations director, Capita Hartshead  
*Bill Thompson*, Customer Account Manager, The Pension Service

September

**“Work After Pensions / Pensions After Work”**

*Pauline Sibbit*, Partner, Pensions Reform Unit, Sacker & Partners  
*Gordon Clark*, European Partner, Mercer Human Resources Consulting  
*Adrian Boulding*, Pensions Strategy Director, Legal & General

November

**“A Legislative Update and Practical Review”**

*Vivien Cockerill*, Partner, Wragge & Co LLP  
*Maggie Craig*, Client Communications Manager, Standard Life Assurance  
*Paul Macro*, Head of Defined Contribution Consulting, Aon Consulting

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2005

January

**“Are we paying enough for our pensions?”**

*Sir Peter Davis*, Chairman, Employers Task Force on Pensions  
*Alan Pickering*, Partner, Watson Wyatt

March

**“Improving Administration Standards in DC Schemes”**

*Wendy Hunter*, Partner, Pensions, Hammonds  
*Ronnie Murray*, Head of Administration, BP Pensions  
*Michael Goy*, Managing Director, Railways Pensions Management



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### 2005 cont.

#### May

##### **“Meet the Press”**

*Mike Foster*, Associate Editor, eFinancial News

*Brendan Maton*, Freelance Journalist (writing for Ft, financial News, the Guardian, IPE and Pensions Week)

*Fennell Betson*, Editor, Investment & Pensions Europe

##### **“Trustee versus Contract Based Schemes: A Look at the Current Situation”**

*Jane Kola*, Partner, Sacker & Partners LLP

*Julian Webb*, Head of UK DC Business Development, Fidelity Pensions Management

*Geof Pearson*, Pensions Manager, J. Sainsbury plc

#### July

##### **“The Challenge of DC Member Investment Education”**

*Alec Spooner*, Scheme Director, Prudential M&G

*Alex Bateman*, Associate, Hewitt Associates

*Alan Proudfoot*, Client Relationship Manager, Capita Hartshead

#### September

##### **“The Default Option: The Latest Thinking”**

*Emma Douglas*, Head of DC Pensions, Threadneedle Asset Management

*Chris Close*, Partner, Sacker & Partners LLP

*Colin Hately*, Head of Pensions, Kingfisher

#### November

##### **“Pension Scheme Design for the Lower Paid (and how it might interact with State Benefits)”**

*Deborah Cooper*, Principal, Mercer Human Resource Consulting

*Chris Hatfield*, PIP Policy Manager, Department of Work & Pensions

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### 2006

#### January

##### **“Communicating with members using the new flexibility offered from A-Day”**

*Andy Cheseldine*, Senior Consultant, Hewitt Associates

*Anne Swift*, Investment Officer DC Team, Merrill Lynch Investment Managers

*David Birtwistle*, International Benefits Director, ICI plc

#### March

##### **“Investment Performance Measurement Issues for DC Schemes”**

*Graham Mannion*, Managing Director, PensionDCisions Limited

*Ian Richards*, Head of Defined Contributions, Legal & General Investment Management

*Karen Thrumble*, Head of Product Development, WM Performance Services

#### May

##### **“Alternative Assets for DC Schemes: Do they make sense for your fund?”**

*Crispin Lace*, Senior Investment Consultant, Watson Wyatt

*Kerry Duffain*, Head of Consultant Relations, Pioneer Alternative Investments

*Moirá Beckwith*, Vice President UK Benefits, GlaxoSmithKline



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2006 cont.

- June**      **“Pensions: From the Outside Looking In”**  
*John Cridland CBE, Deputy Director-General, CB*  
*Reg Hinkley, Chief Executive Officer, BP Pension Trustees*  
*Edmund Truell, Partner, Duke Street Capital*  
*Matthew Craig, Editor-in-Chief, Pensions Management and Pensions Week*
- July**      **“The White Paper – A look at the Implications for DC Pension Schemes”**  
*Donald Duval, Chief Actuary, AON Consulting*  
*Richard Lee, Associate, Wragge & Co. LLP*
- September**      **“Alternatives to Buying Traditional Annuities”**  
*Karin Brown, Annuities Business Director, Prudential*  
*David Barker, Principal, Mercer Human Resource Consulting*
- November**      **“DC Pension Arrangements after Simplification and A-Day – Is the choice just Contract v. Trust?”**  
*Jane Kola, Partner, Sacker & Partners*  
*Clive Wickenden, Client Service Director, Capita Hartshead*

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2007

- January**      **“Ethical and Shariya Funds: To what extent should these be included and what is the investment case?”**  
*Simon Blanch, Institutional Pooled Pensions HSBC Investments (UK) Limited*  
*Crispin Lace, Head of DC Investment Consulting, Watson Wyatt Investment Consulting*
- March**      **“The NAPF & DC Pension Schemes – why the apparent conflict?”**  
*Ralph Turner, Director of Benefits, ICI*  
*Joanne Segars, Chief Executive, NAPF*  
*Andrew Cheseldine, DC Specialist, Hewitt Associates*



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### 2007 cont.

#### May

##### **"Financial Education: Government Expectations vs Corporate Wishes"**

*April Alexander*, Trustee Knowledge and Understanding Team, The Pensions Regulator

*Emma Douglas*, Head of DC Pensions, Threadneedle Asset Management

*Trevor Rutter*, Senior Associate, Communication Consulting Team, Mercer Investment Consulting

##### **"Views from the North"**

*Prof. Rod Coombs*, Vice-President for Innovation and Economic Development

*Prof. Ian Garrett*, Co-Director of the Centre for Analysis of Investment Risk, Manchester Business School

*Peter Morris*, Director of Pensions, Greater Manchester Pension Fund

#### July

##### **"Pensions on the Menu - A Cause for Concern?"**

*Lisa Page*, Head of Flexible Benefits, Aon Consulting

*Lee Nicholls*, Employer Brand and CSR Manager, HAS

*Peter Hurcombe*, Head of Group Pensions, The Royal Bank of Scotland Group plc

#### September

##### **"An Overview of the Past Ten Years"**

*Kevin Wesbroom*, Partner, Hewitt Associates

*Adrian Boulding*, Pensions Strategy Director, Legal & General

*Ralph Turner*, Director of Benefits, ICI

#### November

##### **"White Labelling: The Benefits, Potential Pitfalls and Practicalities"**

*Crispin Lace*, Head of DC Investment Consulting, Watson Wyatt

*Rosie Kumik*, Group Pensions Manager, News International

*Jane Kola*, Pensions Director, Wragge & Co. LLP

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### 2008

#### January

##### **"Technology and Pensions Administration: Where are we and where do we go from here?"**

*Richard Hardy*, Operations Director, Capita Hartshead

*Chris Stanley*, Managing Director, Go Pensions

#### March

##### **"Straight-Through Processing: What does it or will it mean for your pension fund?"**

*Bridget Houghton*, Head of Pensions EMEA, JPMorgan UK Pension Plan

*Ian Richards*, Head of DC Strategy and Governance, Legal & General Investment Management

*Claire Ross*, Client Relationship Manager, Watson Wyatt



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Meeting History

2008 cont.

- May**      **"Financial Education: What should employers and pension funds do?"**  
*Leslie Huss-Smickler*, Pensions Policy Manager, British Telecom  
*David Cassidy*, Chief Executive Officer, JPMorgan INVEST  
*Nigel Aston*, Senior Business Development Manager, Standard Life
- July**      **"DC Governance - How important is it and what should you do about it?"**  
*Alistair Elliott*, Technical Specialist, DC and Governance, The Pensions Regulator  
*Kevin Painter*, Principal, Mercer Retirement Practice  
*Nita Tinn*, Chair of Trustees, Anglian Water Group Pension Scheme
- September**      **"Personal Accounts: Where are we with regard to their introduction and what should employers and pension funds be doing now?"**  
*Ian Patton*, Head of Design and Implementation, personal accounts delivery authority  
*Eddie Thomas*, Director, The Law Debenture Pension Trust Corporation  
*Paul Clark*, Policy Adviser, The ABI (Association of British Insurers)
- November**      **"Protecting Funds in Volatile Markets - Can it be done?"**  
*Craig Gillespie*, Structurer and Marketer, Pensions Team, BNP Paribas  
*Julian Webb*, Head of DC Business Development, Fidelity International  
*Griff Williams*, Institutional Product Strategist, Pioneer Global Investments

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2009

- January**      **"Annuities and their Alternatives"**  
*Helen Dowsey*, Principal - Benefits Solutions, Aon Consulting  
*Tim Gosden*, Head Annuity Product Development, Legal & General Life Assurance Society  
*James Churcher*, UK Pensions Manager, Telegraph Media Group
- March**      **"Have Unions had their Day? Or can they, along with Member-Nominated Trustees, play a positive role in improving Member Management?"**  
*Jim Bligh*, Senior Policy Advisor - Pensions and Employment, CBI  
*Michelle Lewis*, Policy Advisor, Trustee Corporation Team, Personal Accounts Delivery Authority (PADA)  
*Bill McClory*, Trustee Director, BT Pension Scheme
- May**      **"An Update on Pension Fund Disclosure Requirements and What you should do Next".**  
*Richard Llewellyn-Davies*, Scheme Administration Team Leader, Private Pensions Policy and Regulation, Department for Work and Pensions  
*Helen Ball*, Partner, Sacker & Partners  
*Graham Mannion*, Managing Director, PensionDCisions



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- July**      **"The Credit Crunch: A Wake-up Call for DC - What Lessons have been Learned and can Members be Insulated against Future Market Shocks?"**  
*Stephen Bowles*, Head of Institutional DC, Schroders  
*Paul Macro*, Senior Consultant, Watson Wyatt
- September**      **"DC Pensions for High Earners - Do they still make Sense?"**  
*Richard Lee*, Partner, Wragge & Co.  
*Adrian Boulding*, Pensions Strategy Director, Legal & General Investment Management
- November**      **"Absolute Returns or With Profits: The answer to DC members' needs?"**  
*Emma Douglas*, Head of UK DC Sales, BlackRock  
*Peter Cox*, Institutional Business Development Manager, HSBC Workplace Retirement Services  
*Anne Swift*, DC Consultant, Hewitt Associates
- 2010**
- January**      **"DC Governance Update: Looking at Trustee and Corporate Responsibility".**  
*Alistair Elliott*, Technical Specialist, DC & Governance, The Pensions Regulator  
*Paul Macro*, Senior Consultant, Towers Watson  
*Stuart Merry*, Senior Consultant, Capita Hartshead