ePFIF

The Money Purchase Pensions Forum

(A Division of the European Pension Fund Investment Forum)

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.

Meeting History

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

Meeting History

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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

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.

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

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

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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Meeting History

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
Moira Beckwith, Vice President UK Benefits, GlaxoSmithKline

Meeting History

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

Meeting History

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

Meeting History

2009 cont.

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

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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

March **"DC Scheme Communications - What can Pension Funds learn from recent experiences?"**
Catherine Redmond, Chief Operating Officer and Director in the Pension Executive Team, Barclays Bank UK Retirement Fund
Greg Thorley, National Employee Communication Manager and David Cocke, Communication & Education Manager, Standard Life

May **"Helping Members make Informed Choices - Do Modelling Tools really Help?"**
Martyn James, DC Specialist, Principal, Mercer
Lesley Williams, Pensions Director, Whitbread plc
Emma Douglas, Head of UK DC Sales, BlackRock

July **"Pensions and Tax for High Earners (and others) - Considering the Consequences of the Last Budget and the Next!"**
Richard Lee, Partner, Wragge & Co. LLP
Peter Hurcombe, Head of Group Pensions, Royal Bank of Scotland Group Pension Fund
John Foster, DC Consultant, Hewitt Associates

Meeting History

2010 cont.

September **"The NAPF & DC Pension Schemes - Where do we go from here?"**
Kevin Wesbroom, UK Lead, Global Risk Services, Hewitt Associates
Lindsay Tomlinson, Chairman of the NAPF
Ralph Turner, Pensions and Benefits Director, Mars Inc.

November **"A NEST Update after the Government's Review".**
Adrian Boulding, Pensions Strategy Director, Legal & General Investment Management
Ted Belmont, Consulting Actuary, Xafinity Consulting (and Member of the ACA Pension Schemes Committee)
Paul Gilbody, Assistant Director of Market Development & Engagement, NEST

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

2011

January **"Beyond Pensions: A Look at Corporate Wrap Plans and Extended Savings Plans"**
David Calfo, Head of BNY Mellon Group DC Strategy, BNY Mellon Asset Management
Steve Masters, Corporate Vantage Development Manager, Hargreaves Lansdown Corporate Solutions
Jeremy Mindell, Senior Reward & Tax Manager, Henderson Global Investors

March **"The New Pensions Tax Relief Regime - Communication and Administration Challenges and Possible Solutions".**
Eleanor Daplyn, Associate, Sacker & Partners LLP
Nick Throp, Director, like minds communication
Chris Trill, UK Benefits, HSBC Bank plc

May **"Why Should Pension Funds use Consultants for DC Plans and are they worth it?"**
Emma Douglas, Partner, Mercer
Ian Richards, Chairman of Trustees, Next Pension Trustees Ltd.

July **"How to Deliver a Successful DC Transition - Case Study: Lloyds Banking Group"**
Robert Baxter, Head of Pensions Strategy, Lloyds Banking Group
Paul Charles, Director, Isinglass Consulting
Simon Lee, Head of Investments, Group Pensions, Lloyds Banking Group

Meeting History

2011 cont.

September **"Retirement Options - What Should Trustees Do?"**
William Burrows, Founder, William Burrows Annuities
Susan Waites, Partner and Senior Consultant, Hymans Robertson LLP
Yvonne Braun, Assistant Director, Savings & Retirements, Association of British Insurers

November **"Preparing for Auto Enrolment and Beyond - What should Funds be doing now?"**
John Foster, Benefits Consultant, Aon Hewitt
Tracey Treslove, Head of Workplace Delivery for the Workplace Savings Division, Legal & General Assurance Society
Darren Jeffersen, Independent Trustee, Pitmans Trustees Limited

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