ePFIF

The European Pension Fund Investment Forum

Pension Trustees Circle - Meeting History

July 1999

Benchmarking Issues – Part I: "Should you watch your Peers?"
Carl Bacon, Director of Risk & Performance Management,
Foreign & Colonial Management Ltd.
Nigel O'Sullivan, Executive Director, Goldman Sachs International

Part II: "The Implications of selecting an Index"
John Gillies, Senior Consultant, Frank Russell Company
Nick Fitzpatrick, Head of Investment Consultancy Practice,
Bacon & Woodrow

Trustee Responsibilities: "Just how big are they?"
Richard Thomas, Director, The Law Debenture Trust
Ian Pittaway, Partner, Sacker & Partners

Keynote Address: "Should we fear Regulation?"
John Hayes, Chairman, OPRA

Selecting your Managers: "An art or a science?"
Alan Rubenstein, Managing Director, Morgan Stanley Dean Witter
James Stewart, Director of Marketing, Capital International
Geof Pearson, Pensions Manager, J Sainsbury plc

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 Money Purchase Pensions Forum.

Jan. 2000

"Custody – Security and Safeguarding your Assets"
Brian Hill, Senior Investment Consultant, Watson Wyatt Worldwide
Angela Docherty, Senior Corporate Investment Consultant, Unilever plc

"Valuation Assumptions, Methods and Consequences"
Kevin Wesbroom, Partner, Bacon & Woodrow
Chris Lewin, Head of UK Pensions, Unilever plc

"Socially Responsible Investment"
Roger Latham, Treasurer, Nottinghamshire County Council
Richard Thomas, Director, The Law Debenture Trust Corporation

Keynote Address: "How Active Shareholders Add Value"
David Pitt-Watson, Commercial Director, Hermes Lens Asset Management

"Getting the Best from your Scheme Service Providers"
Ian Pittaway, Partner, Sacker & Partners
Jane Collins, Director, Marketing, Credit Suisse Asset Management

Pension Trustees Circle - Meeting History

May 2000

Defining Influences on Occupational Pension Schemes Structure
Panel of Speakers including *Alan Pickering*, Chairman NAPF; George Henshilwood, Hymans
Robertson and Sally Bridgeland, Bacon & Woodrow.

July 2000

"Trustee and Scheme Insurances"
Jonathan Bull, Director, OPDU
David Fry, Investment Director, Philips Pension Fund
Nigel O'Sullivan, Head of Pensions, Goldman Sachs International

Keynote Address: "Stakeholder Pensions and other Current Issues"
Tom Ross, Director, Aon Consulting

"**Stakeholder Pensions Implications"**
Andy Cox, Partner, Bacon & Woodrow
Mark Duke, Principal, Towers Perrin

"Exercising Trustee Discretions"
Rosalind Knowles, Assistant Solicitor, Employment & Benefits, Linklaters
Richard Thomas, Director, The Law Debenture Pension Trust Corporation

"Take-overs and other Shareholder Issues"
Chris Close, Partner, Sacker & Partners
Robert Hails, Partner, Watson Wyatt Partners

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Jan. 2001

"Early Retirement - Options and Consequences "
Trevor Connor, Principal & Actuary, Aon Consulting
Shaun Murphy, Head of Marketing & Communications, Fidelity Pensions Management

"Investment Benchmarking and Index Selection "
Nick Fitzpatrick, Head of Investment Consultancy, Bacon & Woodrow
Stephen Goldman, Managing Director, Head of European Equities ex-Switzerland, Credit Suisse Asset Management

"Member Communication – Getting the Message Across "
Kevin Chapman, Head of Communications Unit, Towers Perrin
Brian Malcolm, Partner, Baillie Gifford

Topical Discussion: "The Equitable Life Issue "
Andy Cox, Partner, Bacon & Woodrow

Pension Trustees Circle - Meeting History

Jan. 2001 cont.

"Practical Risk Management "
Nigel O'Sullivan, Managing Director, Goldman Sachs International
Richard Thomas, Director, The Law Debenture Pension Trust Corporation
Drew Demakis, Senior Portfolio Manager, Sanford C. Bernstein

May 2001

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

July 2001

"Stakeholder Status Report "
Margaret Craig, Pensions Development Manager, Scottish Equitable
Sarah Aitken, Head of DC, Merrill Lynch Investment Managers
Moderator: *Mike Boag*, Trustee, Cable & Wireless Pension Trustee Ltd

"Third Party Administration "
Alistair Hoare, Director of Pensions Administration, Aon Consulting
Ian McQuade, Pensions Operations Director, Capita Hartshead

"FRS17 – Accounting for Pensions "
Peter Sullivan, Executive Director, Goldman Sachs International
Peter Murray, Chief Executive, Railways Pension Trustee Co. Ltd.

Guest Speaker: **"Myners- A Storm in a Teacup?"**
Arno Kitts, Head of UK Institutional Investment, JPMorgan Fleming Asset Management:

"Pension Sharing on Divorce"
Clive Briggs, Head of Research, Towers Perrin
Vivien Cockerill, Partner, Wragge & Co.

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Jan. 2002

"Activism and SRI – Understanding their Relevance"
Raj Thamotheram, Senior Adviser on SRI, USS
Julian Murray, SRI Fund Manager, Morley Fund Management

"The Government Response to the Myners Report – Trustee Implications"
Ian Pittaway, Partner, Sacker & Partners
Penny Green, Chief Executive, SAUL Trustee Company

Pension Trustees Circle - Meeting History

Jan 2002 continued

"Investment Consultant Power, Remuneration and Measurement"
Nick Watts, UK Head of Investment Consulting, Watson Wyatt
Michael Anthony, Independent Trustee

Guest Speaker: "Can Pensions Legislation be Simplified?"
Alan Pickering, Partner, Watson Wyatt

"Solvency Issues for Pension Funds Today"
Mark Duke, Principal, Towers Perrin
Malcolm Jones, Head of Fixed Interest, Aegon Asset Management

May 2002

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

June 2002

"Reviewing the Impact of FRS17 & Myners Update"
Chris Milner, Executive Director, Goldman Sachs International
Alvar Chambers, Senior Investment Consultant, AON Consulting

"Investment Performance Issues and Fees"
Gareth Mason Davies, Vice President, JPMorgan Fleming Asset Management
Val Burdett-Callen, Senior Investment Consultant, PSolve

"Annuity Purchase Options"
Dr Oonagh McDonald CBE, Director, Retirement Income Reform Campaign
Robin Ellison, Chairman, National Pensions, Eversheds

Guest Speaker: "Key Policy Issues for Trustees Today"
Dr Ros Altmann, Independent Consultant, No. 10 Policy Unit, Governor, Pensions Policy Institute & London School of Economics

Table Discussion: "Communicating with Members"
Sue Rendell-Read, Group Pensions Manager, Misys plc
Bill Thompson, Customer Account Manager, The Pension Service

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Pension Trustees Circle - Meeting History

January 2003

“Pension Legislation and Simplification Update”
Barry O’Dwyer, Marketing Director, Standard Life
Glyn Ryland, Partner, Wragge & Co

Guest Speaker: “Shareholder Activism and Good Corporate Governance”
Sir Tim Chessells, Chairman of the BT Pension Scheme

“Transition Management”
Chris Milner, Executive Director, Goldman Sachs
William MacDougall, Managing Director, TRW Investment Management Co. Ltd.

“Alternative Investments Discussion”
“Private Equity” – *Michael Arpey*, Managing Director, Credit Suisse First Boston Private Equity
“Property” – *Nick Mansley*, Head of Property Strategy and Research, Morley Fund Management
Hedge Funds” – *Alastair Altham*, Executive Director, Morgan Stanley Alternative Investment Partners

Table Discussion: “Implications of Trustee Decisions in DC Schemes”
Ian Pittaway, Partner, Sacker & Partners

May 2003

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 2003

“Challenging the Passive Investment Manager”
Stuart Dunbar, Marketing Manager, Baillie Gifford & Co
Chris Robinson, Managing Director (Corporate Pensions) Legal and General Investment Management

“Dispute Resolution”
Malcolm McLean, OBE, Chief Executive, OPAS – The Pensions Advisory Service
Katherine Dandy, Litigation Partner, Sackers

“The Role of Bonds”
Danny McKernon, Head of Credit, Aegon Asset Management
Andy Howse, Investment Director, Fidelity Investments

Pension Trustees Circle - Meeting History

July 2003 continued

"Keynote Presentation"
David Young, Chairman, John Lewis Partnership Pensions Trust Ltd

Table discussion: "How to choose a Consultant"
Mark Ashworth, Trustee, The Law Debenture Trust Corporation plc

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January 2004

"State of Trustee Governance"
Eddie Thomas, Pension Director, The Law Debenture Trust Corporation plc
Vivien Cockerill, Partner, Wragge & Co
"Current AVC, DC and Stakeholder Issues"
David Butcher, Chief Executive, INVESCO Pensions Ltd
Stuart Ritchie, Director (Pensions Development), Scottish Equitable plc
"How to Choose a Benchmark"
Chris Erwin, Investment Principal, Aon Consulting
Oliver Bolitho, Head of UK & Irish Business Development, Goldman Sachs Asset Management
"Keynote Presentation"
Donald Brydon, Chairman, Allied Domecq Pension Trustees
Table Discussion "Raising Administrative Standards"
Peter White, Marketing Manager, Capita Hartshead

May 2004

"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

July 2004

"Pensions Reform – Where are we now?: Practical Implications"
Ian Pittaway, Partner, Sacker & Partners
Howard Jacobs, Director, Universities Superannuation Scheme Ltd.
"Investment Management Agreements – The Latest Thinking"
Simon Putt, Executive Director, Head of UK Institutional Clients, Fidelity Investments
Tom Rice, Senior Legal Adviser, Investment Management Association
"Providing Liability Matching Investment Solutions – Exploring the options including Swaps"
Niall Quinn, Associate, Goldman Sachs
Abdallah Nauphal, Chief Investment Officer, Insight Investment Management
"Keynote Presentation"

Pension Trustees Circle - Meeting History

July 2004 continued

Ronnie Sloan, Independent Consulting Actuary
"Table Discussion - Behavioural Finance"
Christian Elsmark, Director, Head of Investment Services (EMEA), T.Rowe Price Global Investment Services Ltd.

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January 2005

"DC Investment Issues"
Julian Webb, Executive Director and Head of DC Business Development, Fidelity Investments
A Look at Pre-Retirement Education Issues"
Bryan King, Founding Member of the Pre-Retirement Association Financial Awareness Project
"Update on Raising Administration Standards"
Penny Green, Chief Executie, SAUL Trustee Company
"**Active Management vs Enhanced Indexing: A Debate"**
Sasho Bogoevski, Senior Vice President, Managing Director – UK Corporates, AllianceBernstein
Melissa Brown, Managing Director and Portfolio Manager Quantitive Equity, Goldman Sachs & Co
"**Keynote Presentation – Now it's an Act what next?"**
Andrew Campbell-Hart, Standard & Poor's
Table Discussion: Legislation Update"
Vivien Cockerill, Partner, Wragge & Co LLP
Peter Shave, Partner, Wragge & Co LLP

July 2005

"Pensions Act 2004 – some challenges ahead"
Ian Pittaway, Senior Partner, Sacker & Partners LLP
Bryan King, Consultant, The Law Debenture Pension Trust Corporation
"Absolute Return Strategies – Fashion or Holy Grail?"
Tim Morgan, Executive Director, Goldman Sachs International
Nick Hamilton, Product Director, INVESCO Asset Management
"Multi-Managers and Fund of Funds – Where do they fit?"
Robert Burdett, Director & Co-Head Multi-Manager Team, Credit Suisse Asset Management
Brian Henderson, Investment Consultant, Hymans Robertson
"Keynote Presentation"
Robin Ellison, Chairman NAPF
"Table Discussion: Corporate Governance – Can it really add value?"
Rory Sullivan, Director of Investor Responsibility, Insight Investment

Pension Trustees Circle - Meeting History

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January 2006

"An update on the Pension Protection Fund"
Christopher Hughes, Non Executive Director, Pension Protection Fund
Peter Shave, Partner, Wragge & Co LLP
Jim MacLachlan, Managing Director, Pension Services, Standard & Poor's
"A look at Long Bond Investing including Swaps"
Trevor Welsh, Fund Manager, Morley Fund Management
Malcolm Jones, Investment Director, Fixed Income, Standard Life Investments
"The Equity Risk Premium"
Mike Brooks, Head of Investment Risk, Baillie Gifford
Simona Paravani, Asset Allocation Analyst, HSBC Investments (UK) Ltd.
"Keynote Presentation"
Tony Hobman, Chief Executive, The Pensions Regulator
"Interactive Session – A Review (and consultation) of Trustee Responsibilities"
Peter Askins, Head of Policy on Trustee & Scheme Administration, Department for Work & Pensions

June 2006

"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 & Pensions Week

July 2006

Scheme Design after A-Day
Ian Pittaway, Senior Partner, Sackers
Graham Finlay, Consulting Actuary & Benefits Practice Leader, Watson Wyatt
Risk Management
David Bennett, Executive Director, Goldman Sachs International
Guy Freeman, Executive Director, Goldman Sachs International
Chris Hatry, Head of Structured Products, Legal & General Investment Management
Case Studies
Facing up to pension fund deficits
Ros Altmann, Independent Consultan
Chris Holden, Chairman of Trustees
Keynote Presentation
Sir Bryan Nicholson, former Chairman of The Financial Reporting Council and former President of the CBI
Table Discussion: – Trustee Knowledge and Understanding Foundations for Good Governance: Reviewing current developments
Discussion Leader – *Charles Cattell*, Consultant to Pensions Industry Learning Team, The Pensions Regulator's Office

The European Pension Fund Investment Forum

Pension Trustees Circle - Meeting History

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January 2007

Scheme-Specific Funding
Janet Brown, Partner, Sacker & Partners LLP
April Alexander, Head of Regulated Community Learning, The Pensions Regulator
Are Investment Consultants Fit for Purpose?
Roger Brown, Independent Consultant
Tom Ross, Managing Director, bfinance UK Ltd.
Prof. Amin Rajan, CEO, Centre for Research in Employment and Technology in Europe (CREATE)
Seeking Return (from Alpha and Beta) - Session 1: Traditional Investments
Andy Howse, Fixed Income Investment Director, Fidelity Investments
Venita Olsen, Senior Vice President, AllianceBernstein Institutional Investments
Keynote Presentation
Philip Lambert, former Global Head of Pensions, Unilever
Seeking Return (from Alpha and Beta) - Session 2: Non-Traditional Investments
Oliver Bolitho, Managing Director and Head of UK & Irish Business, Goldman Sachs Asset Management
Mark Barker, Chief Investment Officer, Pioneer Alternative Investments
Philip Read, UK Pensions Manager, CarnaudMetalBox Group

May 2007

"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 2007

PPF: Update and How to Address the Levy
Jason Coates, Partner, Wragge & Co.
Guy Freeman, Executive Director, Goldman Sachs International
Frits van Kempen, Head of Product Development, OPDU
Con Keating, Principal, The Finance Development Centre
Investment & Administration
Tim Hodgson, Senior Investment Consultant, The Thinking Ahead Group, Watson Wyatt
Richard Hardy, Operations Director, Capita Hartshead
Absolute Return Strategies
Christopher Gower, Head of UK Consultant Relations, HSBC Investments
Rick Di Mascio, Chief Executive, Inalytics

Pension Trustees Circle - Meeting History

July 2007 continued

Keynote Presentation
Nick Watts, Chairman of the Investment Committee and Trustee board member of The British Coal Superannuation Scheme
The Pensions Buyout Market
David Collinson, Investment Partner, Pension Insurance Corporation
Guy Coughlan, Managing Director and Global Head of Pension Asset *Liability Management*, JPMorgan

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January 2008

"The Impact of Personal Accounts" together with an analysis entitled "Legal Update: Another Pensions Bill"
Glyn Ryland, Partner, Wragge & Co.
"Long-term Investing: A look at the theory"
Peter Scales, Chairman, The Marathon Club
"Investing for the long-term: What is it in theory and how an it work in practice"
Kerrin Rosenberg, Chief Executive Officer, Cardano UK
"Private Equity: Dealing with a Take-over"
Alex Scott, Principal, Pantheon Ventures
"Presentation"
Charlotte Crosswell, Partner, Pensions Corporation
"Extraordinary Popular Delusions and the Madness of Crowds....a 21st Century Update"
Geoff Lindey, Trustee and/or Advisor to five major Pension Schemes
"The Fundamental vs. Market Cap Weights: An active decision"
Dimitris Melas, Head of Applied Research (EMEA Region), MSCI Barra
"Building Portfolios without Prices"
David Morris, Founder, Global Wealth Allocation
"Finance Private Equity: Dealing with a Take-over"
Paul Thornton, Managing Director, Pensions Advisory, Gazelle Corporate

July 2008

"Solvency and Funding Issues"
Max Ramirez, Executive Director, Goldman Sachs International
"Longevity Issues"
Rajeev Shah, Partner, Barnet Waddington LLP
"Employer's Covenant: The Emperor's new clothes?"
Ian Pittaway, Senior Partner, Sacker & Partners LLP
"The Pension Protection Fund: Assessing the sponsor covenant"
Martin Clarke, Executive Director of Financial Risk, Pension Protection Fund
"To Buy or Not to Buy - The Question for Trustees"
Mark Ashworth, Trustee, The Law Debenture Pension Trustee Corporation

Pension Trustees Circle - Meeting History

July 2008 continued

"Winding-up and Buying-out Pension Schemes"
Paul Feathers, Partner, Wragge & Co., and *Jonathan Sarkar*, Head of Corporate Consulting, HSBC Actuaries & Consultants Ltd
"Keynote Presentation"
Eddie Thomas, Director, The Law Debenture Pension Trust Corporation
"Immunisation, Hedging and Swaps"
Kevin Carter, Managing Director and Head of Pension Advisory (EMEA), JP Morgan Securities Ltd
"Managing Liability Risk"
Andrew Giles, Managing Director and Head of Financial Solutions Group, Insight Investment
"Immunisation, Swaps and Hedging"
Joe McDonnell, Managing Director, Global Portfolio Solutions

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January 2009

"Improving Governance to improve Trustee effectiveness"
Fiona Franklin, Partner, Sacker & Partners LLP
"Governance in Practice"
Jonathan Lord, Co-Chairman, HP Pension Plan & Chairman, HP Pension Scheme
"Dynamic Funding & Investment Strategies"
Paul Greenwood, Senior Portfolio Manager, Institutional Investment Solutions, AllianceBernstein
"Dynamic Approaches to Funding and Investment"
Christopher Nichols, Investment Director, Strategic Solutions, Standard Life Investments
"Commodities: They are Real and a Diversifier"
Antoinette Eltz, Product Manager, European and UK Real Return Strategies, PIMCO Europe
"Real Estate presentation"
Phil Ellis, Head of Business Development UK & Continental Europe - Real Estate, Aviva Investors
"Whatever happened to the diversification benefit of fixed income?"
George Cooper, Principal, BlueCrest Capital Management Ltd
"Global Emerging Markets Private Equity (EMPE)"
Koenraad Foulon, Senior Managing Partner and co-founder of Capital International's Global Emerging Markets Private Equity Unit
"Keynote Presentation"
Edmund Truell, Chief Executive, Pension Corporation
"Fees on Alternative Investments: Do you get what you pay for?"
Craig Baker, Global Head of Manager Research, Watson Wyatt
"Fees on Active Management: Do you get what you pay for?"
Olivier Cassin, Managing Director Research and Development, bfinance

Pension Trustees Circle - Meeting History

July 2009

"Scheme Valuations"
Crispin Southgate, Director, Institutional Investment Advisors
"Scheme Valuations"
Chris Watts, Senior Actuary, Pension Advisory Group, J.P. Morgan
`"Personal Accounts"
Dan Monzani, Head of Trustee Corporation, Personal Accounts Delivery Authority
"PADA Update"
Richard Lee, Partner and Ian Curry, Solicitor of Wragge & Co. LLP
"Global Equity Markets: Long-term value & opportunity"
Nick Hamilton, Head of Global Equity Products, Invesco Perpetual
"Asset Allocation - Past, Present and Future"
Scott Jamieson, Head of Structured Products, Aegon Asset Management
"Archiving The History of Pensions"
Alan Herbert, Chairman of Trustees, Box Clever Trustees
"Membership/Participation Issues"
Terry Ritchie, Head of Management Consulting, Capita Hartshead
"Membership/Participation Issues for DC Schemes"
Emma Douglas, Head of DC Sales, BlackRock

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January 2010

"Perspectives on Risk Sharing"
John Cockerton, Consulting Actuary, Towers
"Pension Risk Sharing"
Hamish Wilson, Partner, Hamish Wilson & Associates LLP
"Restructuring and Recovery: Real People, Real Solutions"
Stephen Leach, Associate Director, Covenant Assessment Services, Baker Tilly
"Covenant Monitoring and Assessment Services"
Steve Balmont, Director, The Law Debenture Pension Trust Corporation
"Covenant Monitoring and Assessment: Dealing with sponsors in current conditions"
Donald Fleming, Managing Director, Pensions Advisory, Gazelle Corporate Finance
"Asset Allocation Trends in the Institutional Market"
Olivier Cassin, Managing Director, Head of Research and Development, bfinance
"Introduction to tactical asset allocation"
Katinka Domotorffy, Head of Quantitative Investment Strategies, Goldman Sachs Asset Management
"Pensions 2012: Preparing for the Future and what Lessons can be learnt from the Olympics"
Ian Richards, Chairman of Trustees, Next Pension Trustees Ltd.

Pension Trustees Circle - Meeting History

January 2010 continued

"The Future Outlook for Property"
Mark Meiklejon, Investment Director - Property, Standard Life Investments
"Private Equity Opportunities for 2010"
Christophe Nicolas, Executive Director, Private Equity Fund of Funds Group, Morgan Stanley Alternative Investment Partners
"Due Diligence of Transition Managers"
Graham Dixon, Director, Inalytics
"Transition Management and other Implications of Changing Investment Strategy"
John Minderides, Managing Director & Global Head of Transition Management, J.P.Morgan

July 2010

"Steps Towards Closure: The Trustee View"
Rodney Jagelman, Director, The Law Debenture Pension Trust Corporation
"Steps Towards Closure: Managing the Journey"
Mark Duke, Head of Settlement Consulting Group, Towers Watson
"Step Towards Closure: Managing the Journey"
Ian Pittaway, Senior Partner, Sacker & Partners LLP
"How will people cope with NEST? Is it the death of DC as we know it?"
Paul Leandro, Associate, Barnet Waddingham LLP
"How will people cope with NEST? Is it the death of DC as we know it?"
Paul Sturgess, Director of DC Policy and Product Development Director, Capita Hartshead
"Looking at a more active management of LDI"
Joseph Silmon-Clyde, Head of Retirement Liability Driven Investment, Aviva Investors
"Financial Market Reform: Mandatory centralised clearing"
Andrew Giles, Chief Investment Officer Solutions, Insight Investment
"Economic and Investment Outlook (following the General Election)"
George Magnus, Senior Economic Adviser, UBS Investment Bank
"Active Management"
Divyesh Hindocha, Senior Partner & Global Director of Consulting, Mercer
"Developments in Beta Innovation"
Rick Lacaille, Global Chief Investment Officer, State Street Global Advisors

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Pension Trustees Circle - Meeting History

January 2011

"Engaging effectively with scheme members"
Nigel Ferrier, Executive Chairman, Ferrier Pearce
"Pension Trustees Circle - What can schemes learn from recent experiences"
Stuart Stephen, Group Pensions Director, Lloyds Banking Group
"Can Trustees improve their decision making process to make it more effective?"
Robin Fillion, Senior Consultant, Towers Watson
"Pension Trustees Circle"
Terry Faulkner, Group Head of Pensions, Rexam plc
"DC Realities: Making sense of today's pension environment"
Irshaad Ahmad, Managing Director, UK, Russell Investments
"RSA's Tomorrow's Investor"
David Pitt-Watson, Chairman, Hermes Focus Asset Management
"Pension Trustees Circle - A Pensions Regulation Update"
Jane Kola, Pensions Director and Jason Coates, Partner, Wragge & Co. LLP
"Inflation versus Deflation - the Backdrop"
Richard Ford, Head of European Fixed Income and Senior Member of Global Fixed Income Team, Morgan Stanley Investment Management
"Inflation versus Deflation - how can pension funds better protect themselves and manage the risks of an uncertain future?"
Kerrin Rosenberg, Chief Executive Officer, Cardano
"Risk Management of Potential CPI Exposure"
Adam Baker, Inflation Structuring Specialist, J.P. Morgan
"Behavioural Finance: from market cycles to collective decisions..."
Paul Craven, Managing Director, Head of EMEA Institutional Sales, Goldman Sachs Asset Management International

July 2011

"The Pension Protection Levy 2012/13"
Martin Clarke, Director of Financial Risk, Pension Protection Fund
"Auto Enrolment - Legal & Regulatory Update - What are the Key Issues for Trustees to Focus on?"
David Bird, Senior Consultant, Defined Contribution Team, Towers Watson
"You need to take up knitting, bowls or making jam. Will there actually be any pension schemes in 10 years' time?"
Ian Pittaway, Senior Partner, Sacker and Partners
"No More Easy Fixed Income Beta: Time to Diversify?"
Paul Skinner, Investment Director and Fixed Income Product Manager, Wellington Management International
"The Outlook for Bonds: do they current offer value?"
Richard Ryan, Senior Credit Portfolio Manager, M&G
"Diversified Growth Funds: What are they, have they and can they deliver?"
Mike Brooks, Investment Manager, Diversified Growth, Baillie Gifford & Co
"Diversified Growth Funds: What are they, have they and can they deliver?"
Richard Carlyle, Investment Specialist, Capital International

Pension Trustees Circle - Meeting History

July 2011 continued

"Diversified Growth Funds: The Trustee Perspective"
Michael Chatterton, Director, The Law Debenture Pension Trustee Corporation plc
"Lessons Learned"
Anthony Stern, Director, InterContinental Hotels (IHG) UK Pension Trust
"Protecting Best Interests: Responsible Investment & Fiduciary Duties"
Catherine Howarth, Chief Executive, FairPensions (FairShare Educational Foundation) and Trustee, The Pensions Trust
"Considering Sustainable Investment"
Peter Michaelis, Head of Sustainable & Responsible Investment, Aviva Investors

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