



The European Pension Fund Investment Forum

Pension Trustees Circle - Meeting History

July 2019

Speakers:

Is the End Game Approaching for the Existing Trustee Board Governance Model?

Jane Kola, Partner, Arc Pensions Law

Naomi L'Estrange, Managing Director, 20-20 Trustees

Julia Land, Senior Advisor, Muse Advisory

How Should Maturing Pension Funds Tackle their Next Valuation?

Jenny Condron, Chief Actuarial Officer, Mercer

Vicky Paramour, Director, Law Debenture Pension Trust Corporation

Jos Vermeulen, Director, Financial Solutions Group, Insight Investment

Buy-in, Buy-out, Consolidation, What's Driving Trustee Decisions and What Options are really Available?

Kerrin Rosenberg, Chief Executive Officer (UK), Cardano

Paul Brine, Independent Trustee Director, The Metal Box Pension Scheme

Fraser Smart, Chief Executive Officer, BA Pensions

Keynote Presentation – A Regulator's Perspective for Trustees

David Fairs, Executive Director for Regulatory Policy, Analysis and Advice, The Pensions Regulator

ESG and Responsible Ownership –How Do You Manage the New Reporting Regulations and Can an ESG Approach Deliver Returns?

Ingrid Holmes, Head of Policy and Advocacy, Hermes Investment Management

Leo George, Head of Sustainable Ownership, Railways Pension Trustee Co. Ltd. (RPMI)

Chaired by:

Robert Tickell, Co-Chair, IBM UK Pensions Trust

Dame Jane Newell, Chair, John Lewis Partnership Pensions Trust

The Lord Balfe, Chairman of the Board, MEPs Pension Fund

Nim Maradas, Trustee Director, The Pearson Pension Plan

Dennis Buckley, Chairman, SAUL Trustee Company

January 2019

Speakers:

Key Pension and Investment Legal Issues Update

Sarah Opie, Managing Associate, Linklaters LLP

David Gallagher, Partner, Fieldfisher LLP

Douglas Anderson, Founder, Club Vita

Cashflow Management – Practical Challenges

Ren Lin, Head of Client Strategy & Innovation, Insight Investment



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Steven Catchpole, Pensions Investment Director, Aviva Staff Pension Trustee Ltd.

Mark Walker, Chief Investment Officer, Coal Pension Trustees Services Ltd.

DB Consolidation – Key Challenges and Issues

Sam Jenkins, Senior Consultant, Lane Clark & Peacock LLP

Kerrin Rosenberg, Chief Executive Officer (UK), Cardano

Keynote Presentation - Current Issues and Challenges in Pensions for Trustees to Consider

Malcolm McLean, Senior Consultant, Barnett Waddingham

Complexity of Communication – Keeping Things in Perspective

Sean Westwood, Principal, DC & Financial Wellness, Mercer

Lesley Alexander, Strategic Partner, Ferrier Pearce

September 2018 – PTC North

Speakers:

Legal & Investment Update

Eleanor Daplyn, Partner, Sacker & Partners LLP

Sarah Opie, Managing Associate, Linklaters LLP

Alex Moore, Assistant Director, Economics, Competition and Markets Authority

Consolidators vs Buy-In/Buy-Out vs Self-managed Options

Christian Hardy, Senior Partner, Mercer

Andrew Reid, Head of Business Development UK & Ireland, Insight Investment

Frankie Borrell, Director, Pension Risk Transfer, Legal & General Retirement

DC Update: Building Sustainable Default Funds and Reviewing Decumulation Options

Catherine Doyle, Head of Defined Contribution, UK, Newton Investment Management

Andrew Voysey, Director, Sustainable Finance, University of Cambridge Institute for Sustainability Leadership

Russell Picot, Chair of Trustee Board of the main HSBC Bank UK Pension Scheme

Keynote Presentation

Rt Hon. Nigel Mills MP (Amber Valley)

Rory Murphy, Chairman of the Board, Merchant Navy Officers Pension Fund.

Strategic Asset Allocation in the Context of the Current Geopolitical Environment

Nandini Ramakrishnan, Global Market Strategist, J.P. Morgan Asset Management

Alex Koriath, Head of UK and European Pensions Practice, Cambridge Associates