



Punter Southall

Annual Pensions Conference 2014

Living with Risk

Thursday 2 October 2014 | Mandalay Hotel, 36–40 London Road,
Guildford, Surrey GU1 2AE



Registration: 08:30 | **Start:** 09:00 | **Close with lunch:** 12:45

For Trustees, Finance Directors, HR Directors & Pensions Managers

Keynote speaker: Sally Bridgeland, Avida International and former CEO of BP Pension Trustees Limited

Chairman: John Batting

Annual Pensions Conference 2014: Living with Risk

For Trustees, Finance Directors, HR Directors & Pensions Managers

Conference programme

09:00 – 09:05 **Opening address** John Batting

09:05 – 09:35 **Keynote speaker** Sally Bridgeland
Managing pensions risk within a risk-conscious organisation

09:35 – 10:20 **The risks of derisking** Sankar Mahalingham & Adam Gillespie
How should trustees and corporates assess and monitor risk to shape strategy and enable practical decisions to be made for the right reasons.

10:20 – 11:00 **Syndicate sessions**
Six options (see opposite for details)

11:00 – 11:25 Break

11:25 – 12:05 **Syndicate sessions**

12:05 – 12:40 **Pension risk after 2015** Stuart Southall
Following the radical changes announced to occupational and state pension arrangements, this session will give an overview of the risks to be faced post 2015.

12:40 – 12:45 **Closing remarks** John Batting

12:45 – 13:45 Lunch

13:45 – 14:30 **Optional additional session**
Scheme funding: the implications of the Pensions Regulator's Code of Practice Joanne Livingstone
Summary of key implications for corporates and trustees

Why attend?

Conference sessions will cover all the key issues in managing pension risk for schemes and their corporate sponsors. It will also give you practical and commercial ideas to address the latest pensions issues. Our Keynote Speaker will be joined by experts from across the Punter Southall Group.

Conference syndicate sessions

Syndicate A
Measuring risk Nick Vine

How to understand risk measures such as Value-at-Risk, and their practical application.

Syndicate B
DC matters: the future isn't what it used to be Sarah Hollingworth & Gavin Zaprzala-Banks

Are current defaults fit for purpose? Hear our thinking on a new approach to DC investment strategies.

Syndicate C
Member communication and the guidance guarantee Rob Tinsley

How to engage, guide or advise members on their retirement options following the Government's pensions proposals in the 2014 Budget.

Syndicate D
Options for managing your liabilities Craig Wootton

A review of the options for managing your liability risks and when each is most appropriate.

Syndicate E
Covenant risk Jacqui Woodward

How to assess and monitor sponsor covenant risk.

Syndicate F
Mitigating investment risk through diversification Katherine Lynas

One of the main methods of reducing risk in modern finance theory is to diversify. This session discusses the ways in which pension schemes seek diversification.

Meet the speakers



John Batting
CEO, Punter Southall Limited
Conference Chairman

In 1993 John set up BGJ & Co Limited, a consultancy company specialising in corporate pensions, and providing actuarial, advisory and administrative services for occupational pension schemes. BGJ & Co Ltd was merged with Punter Southall in 2002, and in 2004, John was appointed as Chief Executive of Punter Southall Limited.

John has provided expert reports on actuarial advice and pensions administration, and has also acted as an expert adviser in mediations on pension matters.



Sally Bridgeland
Senior Adviser, Avida International and former CEO of BP Pension Trustees Limited
Keynote speaker

Sally is well known in the UK pensions industry for her thought-provoking views on risk, investment strategy and governance. Until recently Sally was the Chief Executive Officer of BP Pension Trustees Limited. In her seven-year tenure she devised, negotiated and implemented a new funding and investment strategy for the £18bn fund to reflect the trustees' changing perspective on risk.

Sally is a Fellow of the Institute and Faculty of Actuaries and has a first class mathematics degree from Imperial College, London. She is a member of the FTSE Policy Group and a Court Assistant of the Worshipful Company of Actuaries, chairing its Education Committee.

Conference speakers



Sankar Mahalingham

Sankar has 20 years' experience in risk management of pension schemes, from both the corporate and trustee viewpoint. This includes a period working in-house for a major financial institution.



Adam Gillespie

Adam provides both actuarial and investment advice and is currently guiding many of his clients on how to determine the right level of risk to take within an investment strategy.



Stuart Southall

Stuart is Chairman of Punter Southall Limited. In 1988 he established Punter Southall with Jonathan Punter and this remains the most successful start-up in the actuarial consultancy market for over 25 years. He served as the Chairman of the Association of Consulting Actuaries from 2010 to 2012.



Joanne Livingstone

Joanne is a Scheme Actuary, advising trustee and corporate clients. She is also our Technical Director and leads on the development of Punter Southall's services for integrated risk management. Joanne is a member of the Actuarial Council of the Financial Reporting Council.



Sarah Hollingworth

Sarah specialises in corporate advice on defined contribution schemes, with an emphasis on member communication strategies, default investment options and scheme governance.



Gavin Zaprzala-Banks

Gavin advises a wide range of clients on designing and monitoring defined contribution pension arrangements and in particular their investment strategies.



Rob Tinsley

Rob is a Director of Aspire to Retire which focuses on advice and support to individuals, trustees and companies on the options at retirement.



Craig Wootton

Craig has 20 years' experience of helping corporate sponsors and trustees manage the risks around their defined benefit pension schemes. As a practising Scheme Actuary, he has also advised trustees on the implementation of these initiatives.



Jacqui Woodward

Jacqui has 15 years' experience in advising clients on pension issues in the UK and US. She specialises in advising on covenants and in undertaking assessments for both trustees and their sponsoring employers.



Katherine Lynas

Katherine heads up Punter Southall's Manager Research function, which identifies the most effective active investment products for Punter Southall Investment Consulting clients.

Breakout sessions speakers



Nick Vine

Nick is a Scheme Actuary and advises clients on a wide variety of pensions risk projects. He is a specialist in measuring risk.

Important notes

The main session will run from 9:00 to 12:45. There will also be an optional Scheme Funding session after lunch. This session will conclude at 2:30pm.

After you have reserved your place, we will ask you to confirm your preferences for the syndicate sessions and also your preferences for lunch.

Register now



To register for this conference, please contact us:

- ☎ 0845 815 9879
- ✉ events@puntersouthall.com
- 🌐 www.puntersouthall.com/events

For more information or to book by phone, please contact **Richard Geller** on **0845 815 9879** or by email to **events@puntersouthall.com**.

About us

The Punter Southall Group was founded in 1988 and provides a unique range of financial services including actuarial consulting, administration, employee benefits consulting, covenant assessment, independent financial advice and investment services for pension funds, corporates and individuals.

-  company/punter-southall
-  [@puntersouthall](https://twitter.com/puntersouthall)

For further information, contact us on **0845 815 9879**

Awards and Affiliations



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