The-Pensions-Net-Work

"Leading Thought in Long Term Savings"

6th & 7th June 2024

Woodlands Park Hotel, Woodlands Lane, Stoke D'Abernon, Cobham, Surrey KT11 3QB

AGENDA

Tea/Coffee 17:00 **Meeting Starts 17.30**

John Moret
Chairman
The-Pensions-Net-Work

I am delighted to provide the programme for our June meeting. We had some phenomenally positive feedback after our last meeting in February and I am confident that with this latest line up of speakers and topics – even with our after dinner speaker awaiting confirmation – this event will be another really informative and stimulating session with a wide variety of subject matter - some more directly related to the pensions industry and a couple that have broader application. It really would be great to have a good turnout for this event – in the comforting surroundings of Woodlands Park. And don't forget that even if you can't make the overnight stay you can always join just for the Friday sessions - although the networking opportunities are greatest over dinner. So please contact Patricia asap to book your place and I look forward to seeing you in Cobham.

17.40 - 19.00

Belden Menkus
Founder and MD
MenKus & Associates

"The Management Gap – and why AI will make it worse"

Belden Menkus needs no introduction having spoken to us on several occasions. He is the founder and Managing Director of MenKus & Associates, a consulting and CEO advisory firm that works with business leaders and their organisations to help them develop purpose-led strategies and then turn these strategies into results. Always thought provoking and entertaining Belden's talk is likely to challenge some of your thinking and open new avenues for growth and success. Belden is also the host of The Purposeful Strategist podcast. In each episode he interviews a CEO to hear about how they are addressing the issues of purpose and strategy - and what they have learned along the way. He also speaks publicly about purposeful strategy and has facilitated a range of industry meetings on related CEO topics. Don't be late as you won't want to miss this talk.

Drinks at the Bar 19:00 **Dinner 19:30**

After dinner

Robin Ellison
Chairman
College of Lawmakers

"Regulation & Revolution"

FRIDAY

Tea/Coffee 08:15 **Meeting Starts 08:30**

08.35 – 09:40

Richard Smith
Independent Pensions
Dashboards Consultant

"Pensions Dashboards: Which dashboard will you use?"

Richard is an independent consultant specialising solely in pensions dashboards He led the development of the Pensions Dashboards Data Standards at PDP in 2020; is the PLSA's specialist Dashboards Consultant; advises Moneyhub and is Chair of the new Dashboard Operators Coalition (DOC). Richard's independent dashboards blog (DashboardIdeas.co.uk) is approaching its 10th anniversary. Recent announcements have encouraged several major dashboard providers to announce they will offer their own commercial dashboards with the DOC defining best practice. In his presentation Ric hard you'll hear about, and see, the power of dashboards, backed by international evidence, and understand how they will transform UK consumers' confidence & trust in pensions. Don't miss this session!

09:40 – 10:45

Roland Whyte
Chief Executive
Nokkel

"Integrating property wealth into retirement"

Roland is the CEO and Founder of Nokkel Property. He trained with PwC in the financial services division, established and built HSBC's Asset & Wealth Management Global Advisory business and more recently helped globalize Fintech Unicorn FNZ Group in his role as Head of Strategy. He created Nokkel to bridge the gap between finance and property, leveraging his experience across fintech, wealth management and property. Nokkel aims to bring property and financial solutions closer together. Their integrated solution helps advisers and their clients make better property decisions. Wealth statements typically exclude accumulated property wealth or require cumbersome external validation and input. As a result often the biggest piece of a client's total portfolio is little more than an afterthought asset. Should be a really fascinating session.

Tea/Coffee Break

11:15 – 12:15

Jason Whyte
Partner
PA Consulting

"Customer centricity and financial ecosystems"

Jason has 30 years of experience in Life & Pensions, Retail Asset Management and Banking in the UK, India and China with exposure to the full business lifecycle from advice and distribution to operations and IT. He has a degree in Experimental Psychology from The Queen's College, Oxford. Jason helps clients respond to changing markets, regulations and customer needs from strategy through transformation to optimizing operations. Jason will examine financial eco systems and how they assemble financial and non-financial propositions to solve customer needs holistically. Very relevant to the FCA's new consumer duty requirements and the talk follows on naturally from Roland Whyte's talk – just to confirm Roland and Jason are not related.

12:15– 13.25

Andrew Tully
Technical Services Director
Nucleus Financial

"All things technical"

Andrew needs no introduction having spoken before at TPNW and is a well-known and highly respected pensions expert and industry commentator, with a career spanning almost 35 years working in high-profile roles across the sector. Before joining Nucleus in September 2023 he was Technical Director at Canada Life and prior to this was Pensions Technical Director at MGM Advantage. He's also held senior roles with several leading pension providers including Standard Life and Aegon. There's no shortage of material for Andrew's talk and it's been a while since we've had a technical expert to talk to us so this should provide a perfect way to round off the meeting.

Meeting Ends 13:30 **Lunch 13:35** **Depart**

John Moret
Chair
The-Pensions-Net-Work

Please book your places via enquiries@the-net-work-meetings.com

We look forward to seeing you at Woodlands Park Hotel

Patricia McSherry
Owner
The Net-Work Meetings Ltd

The Net-Work Meetings Limited