

OPDU

“Practical Solutions For The Smaller Defined Benefit Scheme”

Tuesday 21st February 2012
90 Fenchurch Street, London, EC3M 4ST

Most Defined Benefit pension seminars focus on the complexities facing larger schemes and offer costly solutions which are generally either inappropriate or not feasible for schemes with more limited resources to implement.

This seminar has been specifically designed to provide practical guidance in the areas of investment strategy, actuarial services, pension consultancy and trustees governance to schemes that have limited time and restricted budgets.

09.15 Registration & Refreshments

09.45 Welcoming Address

Jonathan Bull, OPDU

The Problem Facing Smaller Defined Benefit Schemes

Des Hogan, Thomas Miller Investment Ltd

Scheme Finances In A Volatile World

Keith Williams, First Actuarial

Formulating An Appropriate Investment Strategy

Phil Irvine, PiRho Investment Consulting Ltd

11.10 Coffee Break

11.25 Sole Trusteeship /Investment Governance For The Smaller Scheme

Michael Chatterton, LawDeb Pension Trustees

An Investment Outlook

Abi Oladimeji, Thomas Miller Investment Ltd

Panel Discussion

Jonathan Bull, OPDU

12.45 Lunch

14.15 Close

To register: kelly.moyns@thomasmiller.com ■ online at www.opdu.com ■ tel 0207 204 2753
Please reserve your place as soon as possible, spaces are limited.



Jonathan Bull – Executive Director, OPDU

Jonathan Bull is Executive Director of the Occupational Pensions Defence Union (OPDU). He helped establish OPDU in 1997 with the assistance of a group of independent professionals and representatives from pension schemes. OPDU protects pension funds by providing unique insurance cover and services to trustees and sponsoring employers for their liabilities. OPDU is managed by Thomas Miller & Co Ltd (specialist providers of insurance and risk management services since 1885). Jonathan is a lawyer with 30 years' experience in insurance; a member of the Law Society, PMI, PRAG, NAPF and a trustee of the Pensions Archive Trust; a frequent conference speaker and contributor to pension journals. Pension schemes holding total combined assets in excess of £180 billion have joined OPDU.



Michael Chatterton – LawDeb Pension Trustees

Michael has over 25 years professional services experiences of working with pension funds. During that time he has acted as trustee, scheme actuary, corporate adviser, client relationship manager and chief executive. He now works with trustee boards of pension funds to both develop and implement effective “flight path” strategies. He joined LawDeb Pension Trustees in October 2010 and holds a number of trustee appointments with Law Deb Pension Trustees' clients including final salary, career average and defined contribution arrangements. Michael is also co-ordinating the production of a new Essentials document for Defined Contribution pension plans.



Des Hogan – Head of Business Development, Thomas Miller Investment Ltd.

Des joined Thomas Miller Investment in June 2011 and is responsible for Business Development and Client Service across the UK and Isle of Man. Des spent his career primarily in the institutional pension scheme market and has been advising institutional clients and pension schemes on investment and pension issues for over 20 years. Prior to joining Thomas Miller Investment, Des worked for a number of investment and pension actuarial consultancies and has worked with investment clients across Europe. Des has also been on the judging panel for a number of prestigious pension awards and has spoken at various investment conferences.



Phil Irvine – Director, PiRho Investment Consulting Ltd

Phil is a Director of PiRho Investment Consulting which he co-founded with colleague Nicola Ralston. Between 2003 and 2008 he was a Director of Advisory Services at Liability Solutions, and he headed the consultancy business assisting institutions on absolute return strategies. Phil was previously Chief Investment Officer for TriAlpha (the offshore investment arm for South African bank, ABSA), where he had responsibility for long-only as well as hedge fund products, which he joined in 1999. Prior to TriAlpha, Phil spent 15 years at the UK Life Assurance company, Colonial Mutual, where he was CIO. He has chaired the judging panel of Hedge Fund Review's award for European Fund of Hedge Funds since 2003.



Abi Oladimeji - Investment Strategist, Thomas Miller Investment Ltd.

Abi joined Thomas Miller Investment in 2006. His background is in economic research and he has written extensively on a wide range of topics in financial economics and investment management. Abi has a thorough understanding of research and investment management across the entire spectrum of asset classes including both traditional assets and alternative investments. His role at Thomas Miller Investment ranges from macroeconomic analysis and asset allocation research, to devising investment strategy and serving as portfolio manager for various institutional clients.



Keith Williams FIA ASA – First Actuarial

Keith qualified as an actuary in 1986 and is one of the nine Founders of First Actuarial. He has held senior management positions with both consultancies and insurance companies and is a Scheme Actuary. For most of his working life, Keith has helped both trustees and sponsoring employers to understand the finances of their pension arrangements and to manage the associated risks. Keith's clients really appreciate the fact they can understand his advice! In addition to working with his clients, Keith is a frequent speaker at seminars, including those run by the Actuarial Profession. He is also a former member of the Society of Pensions Consultants' Personal Pensions Sub-Committee.



LawDeb Pension Trustees

