



The-Pensions-Net-Work

"Leading Thought in Long Term Savings"

Thursday, 25th April 2024

Online meeting

5:30 pm – 7:00 pm

Hi all and welcome to the programme for our first virtual meeting of 2024. The subject could hardly be more topical given the recent publication of the FCA's findings following their thematic review of the retirement income advice market. As the FCA acknowledge in their report decisions for consumers approaching or in retirement have become more complex - the dilemmas are getting greater! To discuss these dilemmas we have a panel of experts who can provide very different perspectives on these issues and this should lead to a very lively discussion on a really hot topic! So 90 minutes invested at the end of the day – possibly accompanied by some liquid refreshment – must be a very worthwhile investment. So hopefully we'll have a big audience to participate in what I am sure will be a really enlightening discussion. See you there.

Discussion Topic

"Decumulation dilemmas"

Panellists



Kavi Myladoro

Retirement Income Director – Retail
Just Group



Paul Budgen

CEO & Founder
MyTime



Fiona Tait

Technical & Compliance Director
Intelligent Pensions

Kavi is Just Group's Retail Retirement Income Director overseeing its Individually Underwritten Annuity and Secure Lifetime Income propositions. She joined Just in April 2023 from Royal London where she successfully established a later life strategy and ran its D2C and intermediated later life propositions. Kavi is passionate about her purpose which is to identify innovative ways to make later life propositions and financial advice more accessible to consumers in the UK.

Paul will be known to many of you as he attended TPNW meetings in the past wearing Nest & Smart Pension's "hats". Following a short break after leaving Smart Pension Paul launched MyTime earlier this year. MyTime is an app designed to enable financial advisers to support clients with modest pension pots plan their retirement. I am sure Paul will explain more during the session but it sounds fascinating and a much needed potential solution to the advice/guidance dilemma.

Fiona needs no introduction as she is a regular attendee at TPNW meetings. Having spent more than 30 years working in pensions, Fiona specialises in making them clear and transparent to clients who don't spend all their time reading about them. She is a writer, commentator and speaker on the pension circuit, and an adviser, and acts as the compliance "headmistress" at Intelligent Pensions. Set up in 1998 IP delivers a service to individuals that covers wider pension and investment advice, in addition to other areas of later-life planning.



Please book your place in advance via enquiries@the-net-work-meetings.com

We look forward to "seeing" you.

John Moret
Chairman

The-Pensions-Net-Work

Patricia McSherry
Owner

The Net-Work Meetings Limited



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