

The-Pensions-Net-Work

"Leading Thought in Long Term Savings"



19th & 20th February 2026

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

AGENDA

| Tea/Coffee 17:00 | Meeting Starts 17.30 |
|---|---|
|  <p>John Moret Chairman The-Pensions-Net-Work</p> | <p>Welcome to the programme for our first meeting in 2026 – a big year for TPNW as we celebrate our twentieth anniversary in June. More news on our plans to mark that date to follow in the coming weeks. For now we have a year of extensive pensions activity ahead of us and I am delighted that we're kicking off the year with a programme that I believe addresses many of the key areas of that activity. We have some new faces amongst our speakers -and some that are not so new - but all are subject matter experts and I am sure will have plenty of interesting and topical comments to make. As usual we're indebted to our sponsors Bravura for their support. Do try and get along to the meeting – I am sure it will be worth the effort -and time well spent. But if you can't make it then try and find colleagues who can. I look forward to seeing you in Cobham.</p> |
| 17.40 - 19.00 | |
|  <p>Charlotte O'Leary Chief Executive Pensions for Purpose</p> | <p><i>"Impact integration: How having a positive impact on people and planet links to fiduciary duty and returns"</i></p> <p>This promises to be a really fascinating talk on a highly topical subject which no-one should miss. Charlotte is CEO of Pensions for Purpose which acts as a bridge between asset managers, pension funds and their professional advisers, to encourage the flow of capital towards impact investment. Charlotte has over 15 years of professional experience in asset management and has worked for some very well-known institutions, including Jupiter, Pictet and Cambridge Associates. During her talk she will go through the Impact Investing Principles for Pensions and discuss some of her organisation's research in this increasingly important area. Charlotte is a fitness lover and Hyrox competitor. This should make for a great start to our meeting.</p> |
| Drinks at the Bar 19:00 | |
| Dinner 19:30 | |
| After dinner | |
|  <p>Andrea Barry Deputy Director of Work, Retirement and Transitions Centre for Ageing Better</p> | <p><i>"Title tbc"</i></p> <p>The Centre for Ageing Better is working to make our workplaces, homes and communities inclusive of older people, as well as building an Age-friendly Movement so that society sees ageing in a more positive and realistic way. Andrea leads their work and impactful programmes on employment, transitions, and retirement, while also providing leadership across research and external engagement. Andrea comes from a background of analysis, research, policy, and economics. Most recently, she led on the development of economic models for forecasting and assessing changes to the labour market at Youth Futures Foundation. She also worked at the Joseph Rowntree Foundation as a senior analyst. She has completed a PhD in Economics. Again a talk not to be missed.</p> |
| FRIDAY | |
| Tea/Coffee 08:15 | |
| Meeting Starts 08:35 | |
| 08.35 – 09:40 | |
|  <p>Andrew Tully Technical Services Director Nucleus Financial</p> | <p><i>"Inheritance Tax and pensions: What are the implications for retirement saving and advice?"</i></p> <p>Andrew needs no introduction as he has spoken before at TPNW and has also attended several meetings. Andrew is responsible for the analysis and interpretation of pension regulation, legislation, and taxation issues, and leads Nucleus' team of technical experts. Before joining Nucleus, he was Technical Director at Canada Life and prior to this, Pensions Technical Director at MGM Advantage. He's also held senior roles with several leading pension providers including Standard Life and Aegon. He is a highly respected industry commentator and in addition to updating us on the latest developments in this highly contentious area he will also share some latest findings from the Nucleus Retirement Confidence Index.</p> |

09:40 – 10:45



Charlotte Clark
Director
Financial Conduct Authority

"Title tbc"

I am delighted to welcome Charlotte Clark back to TPNW. She spoke several years ago when she was the Director for Private Pensions at DWP. Since then she has had a stint as Director of Regulation at ABI, leading on areas such as Solvency II reform and the ESG, before joining the FCA in November 2024. Her team at the FCA is responsible for areas such as Consumer Duty, Vulnerability, Redress and Prudential Policy as well as other strategic areas such as the development of policy for AI. Her background is in the civil service where she also had senior roles in HMT and DfE. Charlotte started her career as an economist before moving to wider policy roles. Her work included leading the initial work on automatic enrolment. I feel sure Charlotte's talk will prompt plenty of discussion and debate given the number of pensions changes on the horizon.

Tea/Coffee Break

11:15 – 12:15



Carolyn Saunders
Partner
Dentons

"Pension Schemes Bill -what happens next – and when"

Given the extent of the provisions in the Pensions Scheme BILL and the associated regulations now seemed an ideal time to take stock of just what's in store for the pensions industry in the coming months and years. Carolyn Saunders needs no introduction as she's a regular attendee at TPNW. Carolyn has specialized in pensions for more than 30 years, advising employers, trustees and providers on the full range of pensions issues, including contentious matters, and with a particular interest in ESG. She joined Dentons in 2023 after leading teams at Taylor Wessing and Pinsents. Outside of pensions she is trustee of theatre company, Paines Plough, a member of the London Philharmonic Choir and a theatre and opera addict.

12:15 – 13.25

PANEL SESSION



Adrian Boulding
CDC Specialist - Vestey Holdings



Emma Douglas
Wealth Policy Director - Aviva



David Fairs
Partner - Lane Clark & Peacock



Michael Jones
Partner – Eversheds Sutherland

"CDC – the debate continues"

To round off the meeting we have what promises to be a very lively discussion on the pros and cons of CDC. The panellists really need no introduction as with the exception of Michael Jones they've all been speakers, members of the advisory board or regular attendees at TPNW over many years. Michael comes highly recommended. He is a partner at Eversheds specialising in DC schemes. The Pension Schemes Bill contains regulations on CDC with the first multi-employer scheme possibly in place by the end of 2026. There is also a consultation underway on Retirement CDC schemes. So there will be no shortage of material to talk about and I suspect some differing views amongst the panellists on just how popular the new versions of CDC will be – and how quickly they may be delivered. It should make for a great concluding session.

Meeting Ends 13:30

Lunch 13:35

Depart



John Moret
Chair
The-Pensions-Net-Work

Please book your places via enquiries@nwml.co.uk

We look forward to seeing you at the Woodlands Park Hotel.



Patricia McSherry
Owner
The Net-Work Meetings Ltd

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