



WESTMINSTER AND CITY

The 4th Conference on

DC PENSIONS and Master Trusts

Adapting to a Changing Landscape

Including speakers from:

**ROSS TRUSTEES
HYMANS ROBERTSON
DEPARTMENT FOR WORK AND PENSIONS
SACKERS
ISIO
SMART PENSION
CUSHON
STANDARD LIFE**

Virtual Conference

Wednesday 14 July 2021

10.00 – 15.40 BST



WESTMINSTER AND CITY

The DC landscape is changing rapidly, with further consolidation expected and a continuing shift to master trusts. It is anticipated that by 2026, master trust assets will grow from £35bn to £400bn. Regulatory pressure on smaller DC schemes is likely to accelerate this trend, with many seeing the benefit of outsourcing DC delivery.

Other key drivers of transformation in the market include default fund design becoming increasingly sophisticated, ESG integration, and a rise in pot consolidation which will progress further with the implementation of the pensions dashboard.

Given this evolving landscape, how can providers improve the quality of their default solutions? What are the governance implications when transferring to a master trust? How can the DC market encourage members to save more effectively and how can at-retirement decision making be improved?

This conference will explore the key trends and developments in DC workplace pensions, including the important role of master trusts, and consider what these mean for the industry, schemes and members. It will also include an update from the Department for Work and Pensions on the imminent Value for Members Assessment.

Conference Chairman

Roger Mattingly

Trustee Director

ROSS TRUSTEES

Programme

Key Themes Driving Change in the DC Market

The DC pensions landscape is undergoing significant change and a number of factors are contributing to its transformation. This session will look at some of the key drivers including scheme consolidation, default fund design and pot consolidation. How will these impact the pensions market and how can members be better supported in retirement?

Lee Hollingworth
Partner
HYMANS ROBERTSON

Update on Value for Members Assessment

Smaller schemes with a value of less than £100 million will soon need to have a 'value for members assessment' to determine whether they should consolidate. This session will include the latest thinking from the Department for Work and Pensions.

Emma Varley
Head of DC Pension Policy
DEPARTMENT FOR WORK AND PENSIONS

The Transfer to DC Master Trust Process – Benefits and Concerns

For employers moving their DC pension provision to a master trust, there are many benefits. However, transferring DC assets into a master trust needs careful planning and consideration – what kind of trust is suited to the employer's needs? Does the master trust have appropriate governance in place? What are the cost implications of moving and how easy will it be to transfer funds to a new vehicle in the future? What are the innovations in master trusts' investment strategies pre and post retirement?

Helen Ball
Partner
SACKERS

Assessing the Role of Default Funds and Default Pathways in Master Trusts

Default pathways and default funds can provide a suitable at-retirement solution. Providers are increasingly looking at ways to improve the quality of their default investment solution, including integrating ESG into the design. Will default pathways become more commonplace in master trusts and what impact will this have?

Mark Powley

Head of DC Investment
ISIO

DC, Master Trusts and Member Engagement Strategies

How can DC schemes and master trusts encourage members to save more effectively? Tools and technology have an increasing role to play through better communication, nudges via mobile apps and personalisation. How can these be used to improve outcomes in retirement as well as provide ongoing guidance?

Paul Budgen

Director of Business Development
SMART PENSION

Case Study: ESG and the First Net Zero Master Trust

The Government's recent drive towards a zero carbon economy by 2050 and focus on integrating ESG factors has led to an industry-wide increase in member engagement. This session will outline the process and goals undertaken by Cushon on their path to being net zero.

Ben Pollard

Founder and CEO
CUSHON

Improving Financial Guidance and 'At Retirement' Options

This session will look at the default pathways and the bridge with employee financial guidance. How can at retirement decision-making be improved? What governance and guidance should be in place for transferring DC pensions? What on-going advice provisions should be made?

Jenny Holt

Customer Savings & Investments Director
STANDARD LIFE

Registration

To register for **DC Pensions and Master Trusts** please visit www.westminsterandcity.co.uk. Alternatively please complete the two pages below and email them to **admin@westminsterandcity.co.uk** or post to the address on the next page. Telephone enquiries are very welcome but registrations must be in writing or via our website.

Mr Mrs Ms Miss Dr Other

First name

Surname

Job title

Company/Organisation

Address

Postcode

Telephone

Email

488HC

Ticket Options *please select*

standard delegate registration(s) which includes access to the live online conference and on-demand access to the available content after the event (downloadable from a few days after the conference date).

£290 +VAT at 20% £58 each Total £348 per person

multiple registrations as for standard registration where 3 or more delegates from the same company are booked at the same time (*names can be advised later*).

£260 + VAT at 20% £52 each Total £312 per person

trustee and scheme sponsor registration(s) as for standard registration but reduced price available at the discretion of the organisers. For details please telephone 020 7582 6516

For details of **promotional and branding opportunities**, please contact Karen Fairs
karen@westminsterandcity.co.uk

Payment

Payment Method

Please select one of the methods below and ensure your payment reaches us before the date of the conference. All payments must show the sender's name or, if known, quote the invoice number.

A VAT invoice will be returned with your admission ticket and joining instructions. VAT No. 437284045.

Please give your purchase order number, or reference, or the email address of your accounts payable.

-
- Bank Transfer to HSBC sort code 40-01-08 a/c 91105612.
 - Overseas Bank Transfer IBAN GB67HBUK40010891105612. BIC HBUKGB4139U.
 - Card payment. To pay by card please telephone 020 7582 6516.
 - Cheque made payable to Westminster and City Programmes enclosed.
 - Please send me a VAT invoice. Payment method to be confirmed.

The preferred payment method is bank transfer showing the delegate reference.

Online Event

The conference will be delivered via the Zoom webinar platform. To minimise the risk of technical disruption and deliver high quality transmission, speakers' presentations will, where possible, be pre-recorded a few days before the event and broadcast on the day of the conference. Q&A with the speakers will be live, with questions asked verbally or submitted in writing via the Slido platform.

The conference will begin at 10am and finish at approximately 3.40pm (BST). There will be breaks throughout the day, enabling delegates to refresh and refocus and any sessions missed can be viewed on demand soon after the conference (subject to availability).

Terms

The full fee becomes payable upon registration and must be paid prior to the event. Written cancellations received and acknowledged by 30 June 2021 attract a 90% refund. Registrations made and/or cancelled after 30 June are payable in full. Full substitutions are acceptable, but not part substitutions. Non appearance is chargeable. Each registration covers one person only and is not transferable.

Every effort will be made to keep to the published programme. Occasionally speaker or timetable changes are unavoidable. The right to modify arrangements without liability is reserved. Personal data will be held on our database and used to inform you of other events, products and services from Westminster and City. Please put a cross here if you do *not* want to receive information from us. For information relating to GDPR compliance please see back page.

I agree to the terms and confirm my registration.

Signed

Date

Please send the completed form or your details to **Westminster and City Programmes:**

POST The Coach House, Heath Farm, Tannery Lane, Send, Surrey GU23 7EF

EMAIL admin@westminsterandcity.co.uk FAX (020) 7582 7245

You may also register on our website www.westminsterandcity.co.uk

PHONE (020) 7582 6516 From Overseas ++44 20 7582 6516



WESTMINSTER AND CITY

The 4th Conference on
DC PENSIONS and MASTER TRUSTS
Adapting to a Changing Landscape

For **registrations** please contact
admin@westminsterandcity.co.uk


For **promotions** contact Karen Fairs
karen@westminsterandcity.co.uk

For **conference content** contact Hannah Capstick
hannah@westminsterandcity.co.uk

For **database amendments** contact Linda Griggs
linda@westminsterandcity.co.uk

To **join the conversation** on Twitter or LinkedIn

 #DCmastertrusts2021 | @wcpconferences

 www.linkedin.com/company/westminster-and-city-programmes/

Related Event

The 9th Conference on
DB to DC Transfers
23 June 2021, Virtual Conference

For further information please visit www.westminsterandcity.co.uk

Westminster and City Programmes

PHONE 020 7582 6516 FAX 020 7582 7245
EMAIL admin@westminsterandcity.co.uk
POST The Coach House, Heath Farm, Tannery Lane,
Send, Woking, Surrey GU23 7EF

GDPR Having conducted an LIA in line with ICO guidance, we process personal data to provide individuals with information on events we believe may be relevant to them in their professional capacity. To find out more please see our Privacy Policy on our website. To unsubscribe please contact us using the details above.

© WESTMINSTER AND CITY PROGRAMMES LIMITED 2021. All rights reserved.
The design, format and intellectual content of this brochure are the copyright of Westminster and City Programmes. 'Westminster and City' and the Westminster and City logo are registered trade marks. Any infringement will give rise to legal proceedings.

