



The Pensions
Management
Institute

*Pensions Professionals
in practice*

PMI Autumn Conference

PENSIONS – REACH FOR THE SKY!

Thursday 5 October 2006

One Great George Street Conference Centre
Westminster, London SW1



**10% EARLY BOOKING DISCOUNT
SEE INSIDE FOR DETAILS**

Who should attend

- Pensions Consultants who require both the “big picture” and a technical update.
- Pensions Managers who need advice on risk and regulatory issues, financing strategies and investment trends.
- HR and Finance Directors who need to see pensions as part of long term company development.
- Trustees facing up to their TKU requirements.
- Pensions Administrators faced with implementing Government and EU proposals post April 2006.

PMI and Law Society CPD accredited

Programme – Thursday 5 October 2006

The role of pensions in UK plc -

The employer's view

Speaker to be confirmed

TUC view

Kay Carberry, *TUC Assistant General Secretary, TUC*

DC - Definitely complex!

Lesley Carline, *Business Development Manager, DC Link Limited*

- Decisions for trustees
- Choice versus education
- And now the statistics

Scheme funding - how is it working out?

David Fairs, *LLP (UK) Partner, Pensions Tax & People Services, KPMG*

- Setting the assumptions
- Dealing with the emerging deficits
- Assessing your employer covenant

What are IFAs telling high income earners?

Tom McPhail, *Head of Pensions Research, Hargreaves Lansdown*

- Post A Day funding patterns
- Bonus sacrifice
- Sippis - simplicity and choice
- Post A Day vesting - annuities and ASP

New investment trends explained!

Patrick Norwood, *Associate Director, Research and Economics, Close TEAMS Limited*

- Expected returns for the main asset classes over the coming years
- Alternative' assets and other new products
- Shape of the investment industry to come and the future business model of fund management firms.

Legal update - what's new?

Nigel Moore, *Partner, CMS Cameron McKenna LLP*

- Age discrimination
- Implementing the Pensions Act 2004
- Pensions Regulator
- Miscellaneous

The future of pensions - bleak or bright?

Steve Bee, *Head of Pension Strategy, Scottish Life*

- There will be no mass market for pensions, or any other product, in the 21st Century
- Continued means-testing for pensioners will limit many peoples' choices in the financial markets
- Employers will stop being pension providers, but may become pension partners
- The polarised past will give way to a fragmented future

Conference Chairman

Steve Delo, *PMI Vice President*

After years of constant political wrangling and pension ministers seemingly operating on a revolving door policy – 13 since 1997! – the Government has finally laid down its blueprint for the future of pensions. On 25 May it unveiled its White Paper on Pensions Reform “Security in retirement: towards a new pensions system” to a largely sceptical pensions industry. However, initial fears that the work undertaken by the Turner Commission was merely going to be side-lined have proved unfounded. There seems to be a genuine Government desire to start facing up to the long term demographic, economic and social concerns facing UK pensions sponsors, trustees and advisers.

There is no one magic bullet for adapting our pension system or for saving for retirement. We are, however, entering a fascinating and challenging phase that will shape the future of the pensions world. This Conference will identify, explore, and explain some of the current issues and challenges - and the opportunities that may emerge from this period of change. Delegates will have the opportunity to interact with our expert panel of speakers after each session, time has been set aside for questions.

For 30 years PMI Conferences have established a benchmark of stimulating content, vigorous debate, challenging speakers and networking opportunities that very few other events can match. PENSIONS – REACH FOR THE SKY! will continue that trend and we look forward to seeing you there on 5 October.

Delegate booking form

SEE BACK PAGE FOR
SPECIAL OFFER
BOOKING DISCOUNT

AUTUMN CONFERENCE: PENSIONS - REACH FOR THE SKY!

Thursday 5 October 2006

One Great George Street Conference Centre, London SW1

BOOK THREE OR MORE DELEGATES AT THE SAME TIME AND QUALIFY FOR A 10% DISCOUNT

Please complete one form per delegate, photocopies are acceptable, and return to the address overleaf or fax to the PMI

This form can be downloaded from www.pensions-pmi.org.uk

DELEGATE DETAILS (as you wish them to appear on your badge)

Title	First name	Surname
Job title		
Company		
Address		
		Postcode
Telephone	Email	
PMI membership number	Delegate Category (eg Fellow, Student etc)	

Declaration

I have read and agree to the terms and conditions of registration and cancellation.

Signed	<i>this form is not valid unless signed</i>	Date
--------	---------------------------------------------	------

I do not wish to receive information about future PMI events and services

I do not wish my mailing details to be disclosed to a third party

Terms and Conditions

- The Institute reserves the right to make modifications to the programme(s) and administrative arrangements in the event of special circumstances.
 - Cancellations-in the event if written cancellation received by the Institute at least 14 days before the event,80% of the fee will be refunded. Otherwise no fees will be refundable.
 - If the course cannot be held for any reason,the Institute's liability will be limited to a refund of the appropriate event fee only.
- PAYMENT MUST BE RECEIVED IN ADVANCE OF THE EVENT BEING HELD. A VAT receipt will be dispatched after full payment has been received. Joining instructions will be issued two weeks prior to the event.

Processing of your personal data

Information provided by you on this form will be processed by PMI Services Ltd and used for the purposes of:

- providing the goods and services ordered by you, and for billing and accounts
- sending you information about our other services and offers
- allowing limited third party mailings from organizations where we believe their services may be of interest to you.

METHOD OF PAYMENT - please tick the appropriate box

Option 1 Cheque

- I enclose a cheque made payable to **PMI Services Limited**

Option 2 BACS

- I have made my payment by BACS
- I have included the participant's name(s) , company details and the invoice number (if applicable) in the transmission details.
- I have sent a copy of this booking form to PMI House
- I have sent the BACS payment to: HSBC Bank plc, 100 Old Broad Street, London EC2N 1BG
Sort code 40-07-31 Account number 91267086

Option 3 Credit Card

- Please debit the following account with (Total amount) £.....
Card type: Visa Mastercard Delta Switch/Maestro Solo

Card number

Name (as shown on card)

Billing address (if different from delivery address)

AUTUMN CONFERENCE:

PENSIONS - REACH FOR THE SKY!

Thursday 5 October 2006

One Great George Street Conference Centre, London SW1

Administrative Details

Timing

The Conference will run from 9.30am to 4.45pm
(Registration from 9.00am).

Confirmation of booking

Confirmation of booking, final conference programme and other details will be issued two weeks prior to the Conference date. Please note that payment must be received before the course is held.

Group booking discount/Early booking discount

A reduction of 10% will be offered to companies booking three or more delegates at the same time. A further 10% is offered on all payments received before 31 July 2006.

Delegate cancellation

In the event of written cancellation before Thursday 21 September 2006, 80% of the fee will be refunded. No fees are refundable after this date though it will be possible to substitute a delegate OF THE SAME FEE CATEGORY up to the day of the Conference.

CPD accreditation

This Conference has been accredited under the PMI's CPD programme and the Law Society's CPD (course code GZ/PMI).

Overnight accommodation/Enquiries

Contact PMI Services department on 020 7392 7428 if you require advice on organising hotel accommodation or if you have any other enquiries relating to this Conference.

Fees/Categories

10% discount for companies booking three or more delegates at the same time. A further 10% is offered on all payment received before 31 July 2006.

Unemployed/Retired PMI Members

£145 + £25.38 VAT = **£170.38**

PMI/QPA/QPSA/RPC/RPD Students

£330 + £57.75 VAT = **£387.75**

PMI Ordinary Members

£410 + £71.75 VAT = **£481.75**

PMI Fellows/Associates

£495 + £86.63 VAT = **£581.63**

PMI Affiliates (PMI Trustee Group/Subscribers)

£555 + £97.13 VAT = **£652.13**

Non Members

£595 + £104.13 VAT = **£699.13**

The VAT reg. no. is 524 4770 47.

The fee includes all Conference literature, refreshments and lunch.

If the Seminar cannot be held for any reason, the Institute's liability will be limited to a refund of the appropriate Seminar fee only.

**Please complete and return this form to
PMI Services Ltd, PMI House
4-10 Artillery Lane
London E1 7LS**

**OR FAX TO THE PMI ON 020 7375 0603
Enquiries: pmiservices@pensions-pmi.org.uk**