



The Pension Fund of the Future: G20/UK Pensions Forum, London, Thu. 20th & Fri. 21st Nov. 2025

Day1/Thursday 20th November 🏠 at HEC House, 43 Parker Street 🚇 Holborn

8:40 am Coffee & Refreshments served in the foyer (main concourse)

9:00 am Chairs' Opening Remarks: A Changed Geo-Economic Landscape for the Pension Industry

Nick Sherry, fmr. pension minister, Co-Chair, **TeamSuper**, **AUS Transport**, **Energy & Mining Pension**

Gareth Tancred, FCMA CGMA, Chief Executive Officer, **Pensions Management Institute (PMI)**

- incl. 'the quest for size': why mega-funds and sovereign wealth investors may be necessary

9:20 am Delivering LT Returns & GDP Growth: Centrality of Private Market Assets Diversification

- Led by Callum Stewart, Head of Investment Proposition Development, **Standard Life**
- w/ the Hon. Nick Sherry, Co-Chair, **TeamSuper**, **AUS Transport**, **Energy & Mining Pension**
- w Paul Forshaw, Chief Executive, **Future Growth Capital**, a Phoenix and **Schroders** company
- Stephen Budge, Partner, DC Investment Consulting, **Lane Clark & Peacock (LCP)**
- Session Chair & Rapporteur: Mike Ambery, Retirement Savings Director, **Standard Life**

10.20 am Short Pause-Café Break: served at the Main Concourse, 1st floor

10:30 Leveraging AI & Technological Innovation for Pension Management and Member Engagement

- Chaired by Wade McDonald, Sr. MD, **SS&C Technologies**, and MIT Artificial Intelligence Lab experts
- w/ Helen Dean, Chair, **Standard Life** Master Trust, fmr. CEO, **Natl. Employment Savings Trust (NEST)**
- w/ Nick Sherry, Co-Chair, **TeamSuper** on AI tech, digitalization, and 'deep customization' etc.
- w/ Ian Kelly, Managing Director, Head of Private Markets International, **SS&C GlobeOp**
- with Richard McGrail, Director for AI & Automation, **SS&C Technologies**
- Rapport.: Kate Upcraft, Mbr. Nom. Trustee, **Marks & Spencer Pension** Scheme, Payroll Mgmt. Expert

11:30 Investing in Climate Resilience Starts at Home: Environmental Restoration as an Asset Class

- Plenary presentation by Robert Gardner, Chief Executive and Co-Founder, **Rebalance Earth**

11:45 Applying Advanced Climate Metrics to Financial Analysis, Corporate Strategy and Economic Development: an AI-Powered Managerial Revolution

- Pres. by Sunil Rana, founder & CEO, **Vyzrd Pty Ltd.**, the climate science and strategy platform
- Followed by Q&As discussion w/ **Olivier Rousseau**, Chairman, **Georgia Pension Agency Investment Board (GPAIB)** and the **Hon. Nick Sherry**, fmr. **Pension and Corporate Law** minister

12:15 UK Subsidiary of a Multinational: Country Specific Pension Strategy Within a Global Framework

- The **Intl. Employee Benefits Association** Pres. by Jo Goulding, Pensions Mgr., **Siemens Healthineers**

12.30 Piemontèse Provençal Buffet Lunch held on-site, at the main concourse

1:30 pm Deeper Member Participation and Engagement in Pension Scheme Governance

Introduction by Catherine Howarth, CE, **ShareAction**, Board Member, **NEST Pensions**, followed by roundtable

Governance/Stewardship & Regulation: Role of Trustees, Legal Scholars and Trade Unions (1:45 pm)

- Chaired by Andrew Dobbie, Natl. Officer for Stewardship, **UNISON**, the **UK Public Service Union**
- w/ Robin Ellison, Sol., Chair, **College of Lawmakers**, Chair, **Cambridge Colleges' Federated Pension**
- w/ Catherine Howarth, Chief Executive, **ShareAction**, Board Member (BM), **NEST Pensions**
- w/ Rickard Mills, Dir., **Irish Pensions Trust** IPT, Member, Irish **Ministry of Pensions** Advisory Council
- w/ Prof. Anna Tilba, **Durham University**, ACM on Fiduciary Duties for the **UK Law Commission**
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- Co-Rapporteur: Kate Upcraft, M.N. Trustee, **Marks & Spencer Pension** Scheme, Payroll Mgmt. Expert

2:30 pm Gender & Social Dynamics: Women Empowerment from Plant Floors to Boardrooms

- Led by Deborah Gilshan, Head, ESG & Stewardship (Europe), **AustralianSuper**, Founder, **The 100% Club**
- Helen Dean, Chair, **Standard Life** Master Trust, fmr. CEO, **Natl. Employment Savings Trust** (NEST)
- Janice Turner, Hon. Pres., **AMNT**, Natl. Assn. of Mbr. Nominated Trustees, Editor, **BETCU Union** Journal
- Verena Charvet, Lawyer, Governance Expert, **Merlys**, Executive Cmte., **Women in Banking & Finance**
- Rapporteur: Chris Smith, Chair, City of **Westminster Pension** (part of **LGPS**), Branch Sec., **Unison**

3:30 pm Value-for-Money Retirement Savings and Members Engagement/Behavioural Insights

- Presentation by Patrick Heath Lay, CEO, **People's Partnership**, provider of the **People's Pension**
- Followed by Q&As & discussion with the Hon. Nick Sherry, the financial press and the audience
- Co-Rapporteur: Duncan Rutherford, Founder and Chief Executive Officer, **PensionPay** Ltd.

3:55 pm Pause-Café Break: served at the Main Concourse, 1st floor

4:10 Designing and Managing Modern DC Funds: A Look at the United Kingdom

- Chaired by Gert Dijkstra, former Board Member, **APG** Asset Management
- w/ Eric Deram, Managing Partner & CEO, **Flexstone Partners**, affiliate of **Natixis Investment Partners**
- w/ James Lawrence, Director of Investment Proposition, **Smart Pension**
- w/ Nick Sherry, fmr. pension minister/minister for **Superannuation of Australia**
- Co-Rapporteurs: Helen Forrest Hall, CSO, **PMI** and Sean Farrell, Senior Editor, **Aptia**

5:05 pm The Financial Significance of Climate Risk Metrics for Asset Owners and Asset Managers

- Pres. by Matthieu Renard, Climate Risk Mgr., **Scientific Climate** Ratings, **EDHEC Business School**
- followed by Q&As w/ the co-rapporteurs and the audience

5:25 pm Smart, Green Growth: Midsize Wind & Solar Assets in Germany, Spain and BeNeLux

- Plenary presentation Patrick Lemcke-Brasemann, Co-Chief Executive, **The AREAM Group**

5:40 pm Surmounting the Crisis: What Can We Learn from Iceland's 'Pension Miracle'?

- by Snædís Ögn Flosadóttir, Managing Director, Iceland's **EFÍA** and **LSBÍ Pension**

5:50 pm National Debt, Pension Obligations and the Growth Imperative: Squaring the Circle

- by Dr. Amlan Roy, Demographer & Pension Economist, Partner, **Lane Clark & Peacock** LLP

6:05 pm Summation & Close of Day 1

6:30 pm Cocktails & Dinner: Le Labs House,
15 Bloomsbury Way, 3 min. walk fr. conference centre

Day2/Fri. 21st November

9:00 am Opening Remarks: Recent Developments in the U.S. Pensions Ecosystem

- David John, Senior Strategic Policy Advisor, **AARP Public Policy** Inst., NRS, **Brookings Institution**

9:12 am Drawing-up and Implementing Public & Private Pension Reform: Learning from Global Leaders

- Led by Guy Opperman, fmr. UK Minister of State, Department for **Work and Pensions** covering notably 'Understanding the Future of DB and Local Government Pension Systems'
- w/ Helen Dean, Chair, **Standard Life** Master Trust, fmr. CEO, **Natl. Employment Savings Trust** (NEST)
- w/ Tadas Gudaitis, Chair, **Investment & Pension Assn.** LTU, CEO, **Swedbank Asset Mgmt.** LTU
- w/ Jean-Pierre Maureau, Chair, **Académie de Comptabilité** (FR), Club des **Investisseurs de Long Terme**

10:00 am Understanding Longevity Risk Shocks: What Can Covid-19 Mortality Teach Us

- Presentation by Prof. David Blake, Dir., **Pensions Institute**, City St George's, **University of London**

10:35 am A Modern Approach to DB and Collective DC Management in the United Kingdom (Working Title)

- Andy Seed, Chief Growth Officer, **Aptia Group**, followed by Q&A w/ leading UK and AUS experts
- David Pitt-Watson, Fell., **Cambridge** Judge School, fmr. Chair, **United Nations Environment** Programme
- Rapporteur: Helen Forrest Hall, Chief Strategy Officer, **Pensions Management Institute** (PMI)

11.05 am Short Pause-Café Break: served at the Main Concourse, 1st floor

11:15 am High Integrity Tropical Forests as an Asset for Climate Regulation and Biodiversity

- Presentation by Dr. Daniel Zarin, Executive Director, **Wildlife Conservation Society** (WCS)

11:30 The Impact of DB Surplus Reform on Endgame Planning: Risks and Opportunities

- Presentation by Claire Altman, Business Development & Origination Director, **Standard Life**

11:40 AI's Third Wave Reshaping Finance from Venture Capital to Public Markets

- Chair: **Helena Chao**, MD, **Head of Crossover & Sustainability Investor Coverage**, **Bank of America**
- Henry Gladwyn, MD, OMERS Ventures, **Ontario Municipal Employees' Retirement System** (OMERS)
- Pogos Saiadian, Partner, **Greyhound Capital** Management LLP
- Dr. Iuliia Shpak, Co-Head, Fundamental Equity, Xantium, **Tudor Investment Corp.**

12:20 am Infrastructure as an Asset Class for Pensions: 11 Years on from the World Bank/G20 Push

- Pres. by Mark Moseley, fmr. Lead-Lawyer, **World Bank PPPs**, Sr. Advisor to the **Canadian Govt.**
- Discussant: Dr. Georg Inderst, M.D., **GIA**, Author the **OECD Report on Infrastructure Finance**

12:40 Making Good by Doing Good: Pension Investors Need to Allocate More to Africa (FR w/ translation)

- Short pres. by Cédric Leboussi, Cofounder, The **Liberal Circle**, Editor, **Vu D'Ailleurs** magazine

12:50 pm Conference Summation & Close – followed by light sandwich lunch served on site

- The forum will qualify for 11 CPD hours, which attendees may use twd. CPD req.

The conference is held in London at **The HEC House, 43 Parker Street**  **Holborn**



Also present: attendees from the **United Nations Joint Staff Pension** (UNJSPF), **Kensington & Chelsea PF** (LGPS), **Islington Pension Scheme** (part of LGPS), the **Local Government Pension Scheme** (LGPS), The **Shell Foundation** (UK/NL), **ATP Livslang Pension** (ATP), La **Caisse de Dépôt du Québec** (CDPQ), **Church of Scotland Pension Trustees**, **PFZW/PGGM** (NL), **Fonds de Réserve pour les Retraites** (FRR), the **Bank of Canada** (BoC), **Canada Pension Plan** Investment Board (CPPIB), and **Singaporean** and **Arabian Gulf** sovereign wealth fund executives and board members (trustees) ... etc.

The agenda includes the names of approx. 50+ asset owners out of a total of 115 pax. (incl. sponsors, listed pg.3)