



# Long-term savings conference: mapping the customer journey

**Monday 3<sup>rd</sup> June 2019**  
**One America Square, 17 Crosswall, London**  
**EC3N 2LB**

The FCA and TPR's recent joint pensions strategy outlines their intention to review the entire pensions journey for customers – taking an in-depth look at what tools are needed to enable people to make considered decisions about their pensions.

In doing so, the ABI believes this review should consider outstanding questions arising from the pension flexibilities, an evolving long-term savings market and shifts in customer expectations, including:

- What information do customers need to effectively plan for retirement, and when and how should it reach savers?
- How is the industry and government delivering pensions dashboards, what outstanding implementation challenges does it face and how far will it go to solve the problems of small pots and lost pots?
- How is the industry responding to the regulator's call for ready-made retirement pathways, and the need to improve the uptake of advice and guidance?
- How should policy and regulation adapt to meet these challenges?

Join the debate as we look at how industry practice and policy and regulation can assist customers to navigate the pensions journey

09:45	<b>Registration</b>
10:15	<b>Welcome</b>
	Huw Evans, Director General, ABI
10:20	<b>Keynote Address One:</b>
	Guy Opperman MP, Parliamentary Under Secretary of State for Pensions and Financial Inclusion
10:50	<b>Panel One: Communication across the journey - what works for consumers?</b>
	<b>Chair:</b> David Miller, Partner, KPMG <b>Panel:</b> <ul style="list-style-type: none"> <li>• Lis Costa, Senior Director, Consumers, Economic Growth and Energy, The Behavioural Insights Team</li> <li>• Holly Mackay, CEO, Boring Money</li> <li>• Dominic Ventham, Customer Engagement Lead, Savings &amp; Retirement, Aviva</li> </ul>
11:35	<b>Networking Break</b>
12:00	<b>Panel Two: Next stop - Pensions Dashboards</b>
	<b>Chair:</b> Rob Yuille, Assistant Director, Head of Long-Term Savings Policy, ABI <b>Panel:</b> <ul style="list-style-type: none"> <li>• Jenni Allen, Content Director, Which?</li> <li>• Jackie Leiper, Distribution Director, Scottish Widows</li> <li>• Clare Talbot, Deputy Director, Private Pensions Policy, Department for Work and Pensions</li> </ul>
12:45	<b>Networking lunch</b>
13:35	<b>Keynote Address Two:</b>
	David Fairs, Executive Director of Regulatory Policy, Analysis and Advice, The Pensions Regulator
13:55	<b>Panel Three: Transitions to retirement – paving the way</b>
	<b>Chair:</b> Yvonne Braun, Director of Long-Term Savings and Protection Policy, ABI <b>Panel:</b> <ul style="list-style-type: none"> <li>• Linda Ellett, Partner, KPMG</li> <li>• Jenny Holt, Head of Propositions, Standard Life (Phoenix Group)</li> <li>• Rod McKie, Head of Product Development, Zurich</li> <li>• Doug Taylor, Member of the Financial Services Consumer Panel</li> </ul>
14:40	<b>In-conversation with</b>
	<b>Chair:</b> Yvonne Braun, Director of Long-Term Savings and Protection Policy, ABI <ul style="list-style-type: none"> <li>• John Govett, CEO, Money and Pensions Service</li> </ul>
15:00	<b>Closing remarks</b>
	Yvonne Braun, Director of Long-Term Savings and Protection Policy, ABI
15:05	<b>Close</b>