

Supporting savers' decisions: dashboards, advice and guidance

**21 June 2021
Webinar**

Major developments for pension and investment customers are at the start of a new phase, having been many years in the making. Pensions dashboards are written into law and are now in implementation stage, with broader open data initiatives in development and the Government taking forward its digital identity programme. The FCA is seeking solutions on streamlined advice and personalised guidance, and the Money and Pensions Service is preparing to deliver its first Corporate Plan.

The industry has an opportunity to shape these critical changes. This event will hear updates on each and debate our role in supporting them. Delegates will have the opportunity to hear from key public bodies on dashboards, open finance, advice and guidance, feed into policy discussion on emerging issues, debate the industry's role in delivering change in these areas and understand the direction of regulation and market developments.

10:55	Registration
11:00	Welcome & introduction
	Yvonne Braun, Director of Policy, Long-Term Savings and Protection, ABI
11:05	Keynote Address One
	Richard James, Programme Director, Pensions Dashboard Programme, The Money and Pensions Service
11:30	Panel One: From dashboards towards Open Finance
	<p><i>With the Pension Schemes Act 2021 confirming that data on all pensions must be made available to customers via dashboards, this panel will consider what happens next: how will wider developments on digital ID, open finance and smart data affect dashboards; what potential does the industry see for innovation, and what role should regulation play in facilitating it.</i></p> <p>Chair: Rob Yuille, Assistant Director, Head of Long-Term Savings Policy, ABI</p> <ul style="list-style-type: none"> • James Carter, Head of Pension Product & Policy, Fidelity International • Mary Harper, Managing Director, Aviva Financial Advice, Aviva • Sanjiva Perera, Open Finance Lead, Capco • Sam Seaton, CEO, Moneyhub
12:15	Closing remarks
	Yvonne Braun, Director of Policy, Long-Term Savings and Protection, ABI
12:20	Screen Break
13:30	Welcome back
	Rob Yuille, Assistant Director, Head of Long-Term Savings Policy, ABI
13:35	Keynote Address Two
	Caroline Siarkiewicz, Chief Executive, The Money and Pensions Service
14:00	Panel Two: What next for advice and guidance?
	<p><i>Financial advice is in the spotlight, as a result of recent scrutiny of how the market works and is regulated, especially in the context of the pension freedoms. The Money and Pensions Service has a new brand and new duties, with pressure to attract more users and help them more. The heightened interest comes as the Government and regulators look at financial regulation in light of leaving the EU, and as the FCA's evaluation of its own changes creates opportunities for new forms of advice and guidance. This panel will debate what should happen next to ensure more people get the help they need.</i></p> <p>Chair: Yvonne Braun, Director of Policy, Long-Term Savings and Protection, ABI</p> <ul style="list-style-type: none"> • Chris Brooks, Head of Policy, Age UK • Tim Fassam, Director of Government Relations and Policy, PIMFA • Jackie Leiper, Managing Director, Pensions, Stockbroking and Distribution, Scottish Widows • Sarah Pennells, Consumer Finance Specialist, Royal London
14:45	Concluding Remarks
	Rob Yuille, Assistant Director, Head of Long-Term Savings Policy, ABI
14:50	Close