

Pensions and Lifetime Savings Association North London Group Yearbook 2020/21

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CHAIRMAN'S REPORT for the year ending 31 August 2020

Welcome to the 2020/21 Yearbook of the Pensions and Lifetime Savings Association North London Group.

This report is the Group's twenty-eighth publication and covers the period from 1 September 2019 to 31 August 2020.

We held three very well-attended meetings over the last few months of 2019 and then one in January 2020, all at Aon's Verulam Point office in St Albans. My thanks go to all the speakers who presented to the Group over that period and to Aon for hosting.

Since then, given the covid-19 pandemic situation, all our face-to-face events have been cancelled. We will not be arranging any 'in person' events for the time being.

I will advertise Pensions and Lifetime Savings Association and all associated Local Group webinars as and when they are known so that members have opportunities to meet their CPD requirements and to keep our name out there.

I would like to take the opportunity to thank all those who serve on the Committee and give their time so freely.

In addition, I would like to thank Hillier Hopkins for reviewing our accounts this year, and once again, free of charge.

To everyone - do keep safe and well. Hopefully we'll be able to get back to face-to-face meetings at some point in the not so distant future.

Paul Latimer

Chairman – Pensions and Lifetime Savings Association North London Group

COMMITTEE MEMBERS

The following members served on the Committee during the year ending 31 August 2020:

Paul Latimer *Chairman and Membership Secretary*
Barnett Waddingham LLP Email: plsanlg@barnett-waddingham.co.uk

Joanna Crookes *Secretary*
Lane Clark & Peacock LLP Email: joanna.crookes@lcp.uk.com

Matthew Preston *Treasurer*
Clifford Chance LLP Email: matthew.preston@cliffordchance.com

Michaela Berry *Local Group Liaison Representative and Publicity Secretary*
Sackers and Partners LLP Email: michaela.berry@sackers.com

Howard Bluston *Annual Event Co-ordinator*
London Borough of Harrow and Independent Investment Advisor
Email: Howard_bluston@hotmail.com

Clive Bugeja *Annual Event Co-ordinator*
Airbus Defence and Space Email: clive.bugeja@airbus.com

Sally Rayment *Meetings Secretary*
Aon Email: sally.rayment@aon.com

Mark McKelvey *Annual Event Co-ordinator*
Aberdeen Standard Investments Email: mark.mckelvey@aberdeenstandard.com

ABOUT THE NORTH LONDON GROUP

Our aim at the North London Group of the Pensions and Lifetime Savings Association is to provide anyone involved in the pensions industry with a forum to discuss and debate topical pension issues, to learn about new ideas or initiatives and to network with other members.

We are managed by a committee of volunteers and usually hold six business meetings during the year along with an Annual Event. All our evening business meetings take place at the St Albans offices of Aon (Verulam Point, Station Way, St Albans, Hertfordshire AL1 5HE).

We will continue the suspension of the membership fees for the 2020/2021 programme year. The Committee will review membership fees on an annual basis and will advise you of any changes in due course.

As noted in the Chairman's report all face-to-face events are cancelled for the time being.

RELATIONSHIP WITH THE PENSIONS AND LIFETIME SAVINGS ASSOCIATION

The Local Group Liaison Committee (LGLC) is the key communication forum between the Pensions and Lifetime Savings Association local groups and Pensions and Lifetime Savings Association Head Office in London. Meetings take place regularly throughout the year.

Committee members from all the Local Groups are represented at the meetings of the LGLC and during 2019-2020 various members of the committee represented the North London Group. The LGLC focuses primarily on new legislation and future pension developments.

You can visit us at the Local Groups area of the Pensions and Lifetime Savings Association website. Further details can be found on the Pensions and Lifetime Savings Association website at www.plsa.co.uk.

The Pensions and Lifetime Savings Association is always pleased to receive feedback and suggestions on ways that it may better represent members' interests. These can be channelled through the North London Group Committee or directly to the Pensions and Lifetime Savings Association by contacting:

Switchboard: 020 7601 1700

Web address: <https://www.plsa.co.uk/About-us/Contact-us>

WHAT'S PLANNED FOR 2020/21

The Annual General Meeting will be held by conference call on 27 October 2020.

All other events are cancelled for the time being.

HOW TO GET CPD FOR YOUR ATTENDANCE

We recognise that Continuing Professional Development (CPD) is an important way for pension professionals to continue broadening their knowledge and skills in the ever-changing world of pensions. We therefore keep a record of all the attendees at each of our face-to-face business meetings. You will be able to obtain CPD for attending these meetings. Please ensure you sign the CPD form made available at each meeting. We are registered with the Pensions Management Institute for the purpose of CPD and, if you are a Fellow of the Institute and Faculty of Actuaries and require evidence of attendance, please contact the Membership Secretary who keeps an electronic copy of all the attendees over the past year.

For webinars please follow the guidance provided by the local organising group for each event.

FEEDBACK FROM THE 2020 ANNUAL EVENT

Unfortunately, given the covid-19 pandemic situation, the annual event scheduled to take place June 2020 was cancelled.

CONSTITUTION

The full Constitution (rules by which the Group operates) is available for members through the Group Secretary.

A summary is detailed below:

- The Pensions and Lifetime Savings Association North London Group (the “Group”) is a local group of the Pensions and Lifetime Savings Association.
- The Group’s objectives are to support and promote the objectives of the Pensions and Lifetime Savings Association.
- Membership of the Group is open both to members and non-members of the Pensions and Lifetime Savings Association, particularly in North London, North West London, Bedfordshire, Buckinghamshire and Hertfordshire and those for whom Group meetings are convenient by virtue of their place of business.
- Membership is normally in the name of organisations, but individuals who do not belong to organisations can also be admitted to membership. Attendance at meetings of the Group is open to any representatives of a member. Membership subscription is due annually.
- Voting at General Meetings is by show of hands, unless a secret ballot is demanded by 50% or more of the members present. Each member present is entitled to one vote (cast by a representative).
- The Group is administered by an elected Committee consisting of not less than four and not more than eight persons, who are each elected for a two-year term.
- Three members of the Committee constitute a quorum.
- Approximately half of the Committee retires by rotation at each AGM, being those who have served the longest time on the Committee since their last appointment. The Committee can appoint (and replace) casual vacancies.
- The officers consist of a Chairman, Honorary Treasurer, Honorary Secretary and such others as the Committee considers necessary and are appointed from among their number by the Committee annually.
- Members will receive the Chairman’s report for the previous year before the AGM.
- The constitution may be amended by simple resolution at a General Meeting provided that not less than 14 days’ notice of the proposed change has been given to all members.
- The financial year ends on 31 July and accounts must be prepared and approved by the Honorary Accountants within three months of the financial year-end.