



AMNT Spring conference

Breakout session 28th February 2018



LCP – Communicating to achieve the win, win, win

Bart and Lorraine will chair the session covering the really important issues facing members as they approach retirement, and how trustees can support them in making the best decisions for their financial well-being. Clear communication seems to be at the heart of the solution but understanding what trustees can actually provide and how administrators are going to deal with the flexibilities all need to be considered in order for members to feel secure in their decision making – and avoid being conned by the scammers.



Objective:

To provide you with information so that you can be more confident in raising issues or new ideas that support better member experience and outcomes.



Issues and challenges:

- What should Trustees be doing before considering communication?
- What guidance and/or advice should/can Trustees provide to their members?
- What are good member outcomes?
- What can we learn from the scammers to help our members avoid them?
- What are other schemes doing?
- How do we (Trustees) work better together with the employer sponsor for the benefit of members?



We will address these challenges through:

- Hearing case study examples
- Chairing healthy audience participation during this interactive session
- Giving you key takeaways – you should have at least one positive action to raise/ discuss with your board of trustees from this session

We look forward to seeing you

Bart and Lorraine



Bart Huby is a partner at LCP, and a scheme actuary with over 30 years' experience advising on UK pensions. Bart works closely with his clients to help them understand the key issues so they can make better informed decisions. A big part of Bart's approach to pensions is to give

comfort and confidence that, behind the scenes, all of the complicated details and regulatory requirements are being dealt with properly, promptly and fairly. More recently Bart and his team have been focussing on the many challenges that Freedom and Choice presents to Trustees, sponsors and members; communication being at the heart of achieving objectives and successful retirement outcomes.



Lorraine Porter is Client Development Director for LCP with nearly 20 years' experience in the pensions industry. Lorraine works with all of the partners across LCP and enjoys being part of a team, creating client focused solutions that

deliver better results. Lorraine works with both Trustees and Corporates, specialises in DC and is also responsible for the LCP AMNT relationship.

At LCP, our experts provide clear, concise advice focused on your needs. We use innovative technology to give you real time insight & control. Our experts work in pensions, investment, insurance, energy and employee benefits.



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