

IAPF AUTUMN CONFERENCE

Time	Subject	Speaker
9.00am	Welcome	Kevin Cruise O'Shea, Chairperson, IAPF
	The DB End Game	John Lynch & Tim Gilbert, Lane Clark & Peacock
	Cost Transparency / Value for Money	Iain Clacher, Professor of Pensions & Finance Leeds University
	Revisiting Camelot Bringing the Best of Defined Benefit to Defined Contribution	Brendan Curran, State Street Global Advisors
	Panel Discussion/Q&A	Kevin Cruise O'Shea, IAPF, Brendan Curran, State Street Global Advisors, Ciara Quinn, ESB IAPF DC Committee, Richard Jones, New Ireland
10.55am	Coffee Break	
11.25am	Welcome Back	Jerry Moriarty, CEO, IAPF
	IORP II Review – Presentation, Discussion and Q&A	Jerry Moriarty, CEO, IAPF, Brendan Kennedy, Pensions Authority
	What Schemes Need to be thinking about	Mairead O'Mahony, Aon Solutions Ireland Limited, Tom Gilligan, Align Advisory and Waystone, Caitriona MacGuinness, Mercer
	Interview	Ann Prendergast, IAPF, Bill Galvin, Former CEO, UK Pensions Regulator and the Universities Superannuation Scheme
1.15pm	Lunch	

AGENDA | SPEAKER BIOS | DELEGATE LIST AVAILABLE FROM THE IAPF WEBSITE AT WWW.IAPF.IE/EVENTS OR BELOW QR CODE
SLIDO Go to www.slido.com and insert code #iapf23 to pose questions to audience

CPD This Conference was allocated 4 CPD hours by the IAPF for on-going trustee training requirements. DAY 1: We received 3 CPD hours from the LIA (LIA16554_2023), under Category 2. Pensions and PTP - DAY 2: We received 1 CPD hour under Category 2. Pensions, Category 3. Savings & Investments and PTP. We await confirmation from the IOB and the IIPM. If you have a query relating to the CPD hours, please contact the relevant awarding bodies.

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 Scan here for Agenda and Delegate List



SPEAKERS – DAY ONE



Kevin Cruise O'Shea | Chairperson, IAPF | Head of Compensation & Benefits, Musgrave Group

Kevin Cruise O'Shea is Director of HR: Enablement at Musgrave Group plc. He joined the Musgrave Group in October 2006 having spent the previous 14 years working in pension consultancy with Coyle Hamilton Willis Limited.

In his role Kevin is responsible for the development and implementation of Reward policy and the delivery of HR Operations services across all divisions of Musgrave Group plc.

Kevin graduated from UCC in 1990 with a BA in Economics & Sociology and subsequently obtained an MSc in Investment & Treasury from DCU in 1992. He is a Fellow of the Irish Institute of Pensions Management and has completed the IIPM's Law and Governance Programme for Trustees (QPT).

Kevin has been involved with the IAPF and has served on various Committees of the Association over the course of the past 25+ years.



John Lynch | Partner | Lane Clark & Peacock

John is a founding partner with LCP Ireland, and is a Fellow for the Society of Actuaries in Ireland. Prior to that John worked for Standard Life in the UK and Ireland.

John is both a PRSA Actuary and Scheme Actuary. John leads the pensioner buy-out team in LCP Ireland and has successfully led a number of recent annuity buyouts in excess of €100m.



Tim Gilbert | Partner | Lane Clark & Peacock

Tim is a partner in LCP's longevity de-risking team, and specialises in advising pension scheme sponsors and trustees on their end-game strategy. This includes advising on the execution of buy-ins, buy-outs and longevity swaps.

Tim has advised on a wide range of transactions, from buy-ins and longevity swaps for multi-billion pound schemes such as the Marks and Spencer and Santander pension schemes, to sub-£20m buy-outs through LCP's streamlined buy-in and buy-out service.



Professor Iain Clacher | Director | University's Centre for Financial Technology and Innovation

Iain is Professor of Pensions & Finance, and the founder director of the University's Centre for Financial Technology and Innovation. Iain is a recognised internationally as an expert on pensions and retirement savings, most notably on retirement decision-making, pension fund investment, infrastructure investing, sustainable pension systems, trustee governance, and fund management costs and fees. He is widely published in international journals, a key contributor to pension policy and practice, and an expert advisor to a range of businesses, policy makers and organisations.

A central feature of Iain's research is its real-world relevance, he is often cited in the press on issues of pensions, finance, and economics. He has advised organisations including, The CERN Pension Fund, The City of London Corporation, The Work Foundation, The Pensions and Lifetime Savings Association, The Office for National Statistics, he was a board member of the IDWG of Financial Conduct Authority, and most recently was an expert witness to the Work and Pensions Select Committee investigation into Liability Driven Investment.



Brendan Curran | Head of Defined Contribution, Americas | State Street Global Advisors

Brendan is a Managing Director of State Street Global Advisors and Head of DC, Americas. In this role, Brendan is responsible for leading a team of experienced investment strategists, product developers, and participant engagement experts who focus on expanding State Street's sales efforts across DC clients and prospects, supporting the existing client base, and contributing to the on-going development of a best-in-class DC product offering across the U.S. The team also serves as an internal and external expert on State Street DC strategies, plan design architecture, and key regulatory and legislative topics affecting the retirement industry for Plan Sponsors, Consultants and Regulators. Brendan is a voting member of the DCIG which helps oversee State Street's DC multi-asset class solutions funds including TDFs and Real Assets.

Brendan earned a B.A. in Economics from Connecticut College.



Ciara Quinn | Pension Investment Analyst | Enterprise Services, ESB | IAPF DC Committee

Ciara Quinn is the Investment Analyst for ESB Pensions. Ciara has worked in ESB Pensions for three years working on the Defined Contribution Scheme and the Defined Benefit Scheme.

Key responsibilities include monitoring fund performance relative to benchmarks and evaluation of Investment Managers across multi asset classes.

Ciara holds a Bachelor of Science in Energy with Finance degree and has completed the Association of Chartered Certified Accountants (ACCA) exams.



Richard Jones | Director of Product, Pricing & Distribution | New Ireland

Richard joined New Ireland in 2021 as Director of Product, Pricing and Distribution. He has a wealth of industry expertise from a career in Life & Pensions and has held senior executive roles with a range of insurers and banks both Internationally (US, UK and Australia), as well as in Ireland.

Richard has strong commercial experience covering Product, Distribution, Transformation and Strategy. Before joining New Ireland, Richard was the Head of Product, Marketing and Pricing with Aviva. Prior to this he held a number of senior commercial roles with National Australia Bank. Richard also has extensive experience in Group Defined Contribution Pensions, having helped establish NEST (one of UK's largest auto enrolment pension schemes), as well as fund management having worked with Fidelity Investments in Boston.



Jerry Moriarty | CEO | IAPF

Jerry Moriarty is CEO of the IAPF which represents pension savers in Ireland. Its members are responsible for some €128.7bn in retirement savings and aims to ensure people in Ireland can have pensions that are secure, fair and simple. Jerry is Vice-Chair of PensionsEurope and chairs its Standing Committee on Future of Pensions. He is Chairperson of SIF Ireland (the Irish Sustainable and Responsible Investment Forum) and is a member of the European Insurance and Occupational Pensions Authority's Occupational Pensions Stakeholder Group.



Brendan Kennedy | Pensions Regulator | Pensions Authority

Brendan Kennedy is Pensions Regulator and chief executive of the Pensions Authority. He has held this position since 2006.

Brendan has spent almost his entire career in pensions. Before joining the Authority in 2004, he held a variety of life insurance and consulting positions.

Brendan qualified as an actuary and is a Fellow of the Irish Institute of Pensions Management. He also chairs the Technical Committee of the International Organisation of Pension Supervisors.



Mairéad O'Mahony | CEO | Wealth Solutions | Aon Ireland

Mairéad joined Aon in June 2022, and has almost 20 years' experience in the pensions and investment industry, most recently as Chief Commercial Officer and before that DC/Financial Planning Business Leader within another large firm. Mairéad is a qualified actuary and a UCD BAFS (2003) graduate.



Tom Gilligan | Internal Audit Key Function Holder/Data Protection Consultant | Align Advisory and Waystone

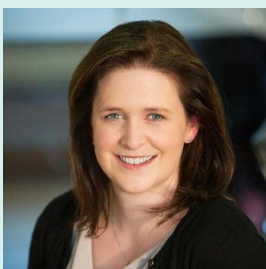
Tom provides internal audit key function holder services (IA KFH) to occupational pension schemes, with Align Advisory Ltd.

Tom provides data protection consultancy services to clients in both the public and private sectors, with the Cyber & Data Protection Team at Waystone Compliance

Solutions Ltd.

Tom holds a commerce degree from NUI Galway. He is a Fellow of Chartered Accountants Ireland. He holds a number of data protection qualifications including Certified Data Protection Officer and CIPP/E.

Tom was chair of the IAPF's Regulatory and Administration Working Group until 2022. Tom is a member of the Association of Data Protection Officers Executive Committee since 2021 and serves as Co-chair of the European CEDPO DPO working group.



Caitriona MacGuinness | Partner, Defined Contribution & Private Wealth Market Leader | Mercer

Caitriona is Partner and Defined Contribution & Master Trust Leader for Mercer in Ireland. Her role involves leading all aspects of Mercer's DC business, ranging from DC consulting business to overseeing the Mercer Ireland Master Trust.

Caitriona has 21 years of experience in the investment and pensions industries. Before joining Mercer, she worked for 12 years as a senior fund manager at KBC Fund Management, specialising in the management of emerging market equities.

Caitriona is an active member of the investment profession in Ireland. In addition to being a CFA Charterholder, she is a former President of CFA Society Ireland. She has a Master's degree in Financial Services from University College Dublin and an undergraduate degree in international Commerce from National University of Ireland Galway.



Ann Prendergast | Head of State Street Global Advisors Europe Ltd | State Street Global Advisors Europe

Ann Prendergast is a Senior Managing Director and Head of State Street Global Advisors Europe Ltd. In her role, Ann has responsibility for SSGA's business in the European Union which includes portfolio management, distribution, product development, fund management and operations. This business operates from 2 investment centres and a number of distribution branches.

Prior to this role, Ann was Head of State Street Global Advisors Ireland. She joined the organisation as a relationship manager in 2000 and became head of this area in 2010, with responsibility for managing the firm's engagement activities with a diverse client base.

Previously Ann worked with the Bank of Ireland Group in both their fund administration and private banking divisions.

Ann holds a Business Studies Degree from the University of Limerick and is a member of the Association of Chartered Certified Accountants (ACCA). She is former Chairperson of the Irish Association of Pension Funds and is on the Board of the National Gallery of Ireland.



Bill Galvin | Former CEO, UK Pensions Regulator | Former CEO, Universities Superannuation Scheme

In September 2023, Bill stepped down after a decade as the Group Chief Executive Officer of Universities Superannuation Scheme (USS), one of the largest pension schemes in the UK, with more than 528,000 members across 330 institutions, and with assets of £75.5bn (March 2023). During his time, the scheme closed the final salary arrangements and introduced an innovative hybrid pension scheme, to manage risk and affordability, while retaining a core DB offering.

Between 2010 and 2013, Bill was CEO at the Pensions Regulator through the introduction of automatic enrolment into corporate pension schemes in the UK. This included the construction and operation of the compliance regime overseeing the duties of over 1.5m employers, as well as the oversight of their pension providers.

Bill has been a senior civil servant at the Department for Work and Pensions responsible for private pensions policy. Bill also worked at IBM, in market management and corporate development roles. He was previously a strategy consultant specialising in value creation and delivery from mergers and acquisitions.

Bill is a governor of the Pensions Policy Institute, has been a non-executive director at the Solicitors Regulation Authority (UK) and the Pensions Advisory Service. He has also been a member of the PLSA's DB Council and sat on the managing board of the Committee of European Insurance and Occupational Pensions Supervisors.

DELEGATE LIST

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Amy	Peat	IAPF
Andrew	Nugent	Pensions Authority
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Anna	McIvor	State Street Global Advisors Europe
Anna- Marie	O'Sullivan	Aon
Anne	Keogh	Construction Workers' Pension Scheme
Barry	Holmes	Royal College of Surgeons in Ireland
Barry	O'Leary	State Street Global Advisors Europe
Bernard	Barron	Mazars
Bill	Galvin	Universities Superannuation Scheme
Brendan	Kennedy	Pensions Authority

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Deirdre	Ross	IAPF
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Diarmuid	Murphy	ESB Pensions
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Donal	O'Flaherty	Irish Pensions Trust Limited
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Edel	Coughlin	permanent tsb
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Ian	Devlin	William Fry LLP
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James	Fouracre	Ruffer
James	Fitzsimons	State Street Global Advisors Europe
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Jamie	McConville	Zurich Life Assurance plc
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Jerry	Crowley	First Active Pension Scheme
Jerry	Moriarty	IAPF
Joanne	Roche	KPMG
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John	Gethin	KBC Bank Ireland
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Kevin	O'Connor	Irish Life Assurance
Kevin	Coughlan	JP Morgan Asset Management
Kevin	Cruise O'Shea	Musgrave Group plc
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Noel	Beecher	Transport Infrastructure Ireland
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Oliver	Kelly	Lane Clark & Peacock Ireland Ltd
Olwen	Kelly	Mercer
Padraic	Nolan	Irish Life Investment Managers
Pat	Mooney	First Active Pension Scheme
Patrick	Furness	Independent Trustee Limited
Patrick	Cosgrave	New Ireland Assurance Company plc
Paul	Flynn	New Ireland Assurance Company plc
Paul	Doyle	RTÉ
Paul	Dunne	State Street Global Advisors Europe
Paula	McGauran	Roadstone Pension Trust Ltd
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Sarah	Judge	Department of Employment Affairs and Social Protection
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Sylvia	McNeece	Pensions Authority
Thomas	Plunkett	
Thomas	Brosnan	AA Ireland Pension Scheme
Tim	Gilbert	Lane Clark & Peacock Ireland Ltd
Tom	Gilligan	Align Advisory Limited
Tomás	Griffin	National Treasury Management Agency
Una	Kerrigan	IBM Ireland Ltd
Ursula	Dolan	WTW
Yvonne	Lynch	Society of Actuaries in Ireland

