

# About the PPI

*The Pensions Policy Institute is an educational charity set up to promote, on a non-political basis, the study of pensions and other retirement provisions.*

The PPI has established itself as **an authoritative independent commentator on policy on pensions and retirement provision**. Our publications provide the facts and encourage debate. They are used in Parliament, in the media, by pension providers and by many others in the pension community. The PPI provides research and analysis on the implications of pension reform proposals on state pensions, private pensions and on the interaction between them. This work enables the PPI to be **a well-informed analyst and commentator on pensions policy and retirement provision**.



The PPI produce an extensive agenda for research annually, our supporting members play a role in setting and achieving the agenda. Our Core Research is funded with income from the PPI's Supporting Membership Scheme and includes:

- **The Pensions Primer:** a guide to the UK pensions system
- Consultation responses
- Briefing notes
- Pensions Facts
- Pensions Modelling and Development
- The distributional impact of State Pension age rises

The PPI undertakes commissioned research for third party clients provided that the research is:

- Within the PPI's charitable objective;
- The PPI has the capability and the capacity to undertake the research; and
- The research sponsor or sponsors are happy for the final research to be published.

We have recently concluded extensive research covering various topics including, Value for money in DC workplace pensions, The new pensions landscape, Adequacy in retirement, Automatic enrolment changes and The Future Book II. Full details of all of our research can be found at: [www.pensionspolicyinstitute.org.uk/publications/reports](http://www.pensionspolicyinstitute.org.uk/publications/reports)

Over the next twelve months the PPI plans to publish a series of research reports that investigate the topic of consumer engagement, each report will have a specific theme. Defined Benefits: Today and Tomorrow, sponsored by Mercer, brings together the latest data on the state of private sector DB pensions in the UK. These projects form a small part our research agenda for 2017/18.

**For further details of all PPI research please contact Sarah Luheshi, Deputy Director:  
[sarah@pensionspolicyinstitute.org.uk](mailto:sarah@pensionspolicyinstitute.org.uk)**

## *PPI Membership Scheme—Become part of the debate*

We are not a lobby group for any particular solution. We believe that policy should be made with good, independent information and analysis. Our Supporting Members, represent a cross section of the industry. The PPI is an educational charity and does not receive any government funding. We rely upon the support of our membership. Our members assist us to shape our annual research agenda and allow us to maintain our independent and unbiased standing within the industry.

### **Becoming a Supporting Member of the PPI**

In recognition of the diverse nature of the pensions industry, the PPI offers four levels of membership, with varying benefits. All PPI Members are invited to attend PPI events free of charge.

**Platinum Supporting Members**  
**Gold Supporting Members**  
**Silver Supporting Members**  
**Associate Members**

Our supporting members support the PPI as a thriving, independent research institute.

### **The PPI would like to thank our current Supporting Members.**

**Platinum:** Just Retirement, The Pensions Regulator, Columbia Threadneedle Investments.

**Gold:** AXA, DWP, Hymans Robertson, LV=, MFS Investment Management, NEST, RPMI, Standard Life Group, The People's Pension.

**Silver:** Age UK, AON Hewitt, ABI, Aviva, Barnett Waddingham, BP Pension Trustees, Cardano, Exxon Mobil, MNOFF, Old Mutual Wealth, PLSA, Mercer, Prudential UK & Europe, Royal London/Scottish Life, Sackers, Schroders, Scottish Widows, Shell Pensions Management Services, CII/TPFS.

**Associate:** Brian Shearing and Partners Ltd, Clark Benefit Consulting Ltd, Greater Manchester Pension Fund, Lancashire County Pension Fund, Lincoln Pensions Ltd, National Association of Retired Police Officers, Occupational Pensions Defence Union (OPDU), Pendragon, RBS (Research Team).

Our members are given first priority for commissioning research and receive a discount in recognition of their level of membership. For research commissioned after 1st February 2017 these discounts are:

	Platinum Members	Gold Members	Silver Members
1st Year of membership	10.0%	5.0%	0%
After 1 year	12.5%	7.5%	2.5%
After 3 years	15.0%	10.0%	5%

For full details of our membership scheme including categories, benefits and our research agenda please contact:

**Danielle Baker, Head of Membership & External Engagement,**  
[danielle@pensionspolicyinstitute.org.uk](mailto:danielle@pensionspolicyinstitute.org.uk)

## *PPI Membership Scheme—Become part of the debate*

### **Platinum Supporting Members: (at least £16,700pa)**

- **PPI experts will be available for one event per year** in your organisation, such as client events, or in-house discussions on the latest thinking in pensions policy or in depth presentations on PPI research or modelling.
- **PPI experts will provide 2 days per year tailored research** relating specifically to your organisation's requirements **or a discount of up to 15%\*** on any research commissioned from the PPI.
- **Highlighted recognition of your commitment to corporate social responsibility** by accreditation on the PPI website **and** explicit recognition of your organisation's support in major PPI reports.
- **Invite to the PPI annual dinner** usually held at the House of Lords
- **Knowledge Sharing Seminars** three free places per annum for staff attendees
- **Including all silver level benefits.**

### **Gold Supporting Members: (at least £11,100pa)**

- **PPI experts will be available for one event per year** in your organisation, such as client events, or in-house discussions on the latest thinking in pensions policy or in depth presentations on PPI research or modelling.
- **A discount of up to 10%\*** on any research commissioned from the PPI
- **Knowledge Sharing Seminars** £125 discount per person to attend the seminars
- **Invite to the PPI annual dinner** usually held at the House of Lords
- **Including all silver level benefits.**

### **Silver Supporting Members donate at least £7,300pa (at least £4,700 pa for registered charities and grant-giving Trusts and Foundations) and benefit from:**

- **Hard copies of all major PPI research reports** and electronic copies of PPI Briefing Notes
- **A discount of up to 5%\*** on any research commissioned from the PPI
- **Knowledge Sharing Seminars** £100 discount per person to attend the seminars
- **An invitation to at least three PPI research events** each year, of which one will be exclusively for Members.
- **An invitation to the PPI Annual General Meeting.**
- **The opportunity to contribute ideas to the PPI's research plan.**
- **Priority over non members** for commissioned research, speaking opportunities at or hosting/sponsoring of PPI events.
- **Recognition of your commitment to corporate social responsibility** by accreditation on the PPI website, **and** explicit recognition of your organisation's support in major PPI\*\*
- **Enabling the PPI to build** on its contribution to evidence-based, independent analysis on pensions and retirement policy.
- **Advanced sight of all major PPI research reports** where permitted

\* Terms & Conditions apply

\*\* Subject to qualification period

**We also offer an Associate Membership category, if you are a single employer DC/DB scheme, a Local Government Pensions Scheme or an Independent Governance Committees, please contact Danielle Baker for details.**

*The PPI Team is available to speak at conferences, in-house events, roundtables induction days*

The PPI team members are all accomplished speakers on the circuit, appearing regularly at trade conferences, and on radio and news items on TV. The PPI will provide the fact on any subject within the pensions and retirement genre and can link to recent PPI research conducted. Our opinions are unbiased and unaffiliated and will provide a solid baseline for any debate. Our members can receive this benefit free of charge (excluding expenses) outside of the membership agreement fees will apply. We will always try to work within your events budget.

For further details, cost, availability and bookings please contact,

**Danielle Baker:** [danielle@pensionspolicyinstitute.org.uk](mailto:danielle@pensionspolicyinstitute.org.uk)

t: 020 7848 4467

m: 07714 250 910



**Chris Curry** joined the PPI as Research Director in July 2002 and was responsible for the research programme for 11 years prior to being appointed Director in June 2013. Chris now has responsibility for leading and managing the PPI. At the PPI Chris has authored and presented a number of research reports analysing pensions (including state, private and public sector pensions), pension reforms and other provision for retirement income. Chris is experienced in presenting research findings to a wide range of audiences and to the media.

**In February 2017** Chris was announced as one of the three co-chairs for the DWP AE Review Advisory Group. Chris will be leading on providing advice on the theme of Contributions.

The review will look to ensure that workplace pensions continue to meet the needs of individual savers, and employer, while remaining fair, affordable and sustainable for future generations.



**Sarah Luheshi** has overall responsibility for the PPI's research programme, as well as supporting the PPI's Director. She has over thirty years' experience in financial services, initially working for a FTSE 100 composite insurance company and then as a management consultant, both in the UK and overseas. The majority of her 15 years as a management consultant focused on delivering quantitative and qualitative research projects for major clients, with an emphasis on private pensions. She has presented and spoken at a number of events on a range of topics including lessons from around the international pension world,

tax relief, the complexity of DC consumer decision making and IGCs.



**Daniela Silcock** is Head of Policy Research at the Pensions Policy Institute (PPI), and she leads the PPI Policy Research team. She has a wealth of experience in conducting quantitative and qualitative research into all aspects of state and private pensions policy, writing articles for journals and national press, and presenting to a variety of domestic and international audiences, including radio and television appearances.

Daniela originally joined the PPI in 2008 and took a short break in 2012 to work as a Committee Specialist for the Work and Pensions Select Committee.



**Tim Pike** is the Head of Modelling of the PPI responsible for delivering the models and modelling to support the PPI's current research program. The modelling includes projections of individual outcomes, of costs to the state and the impact of pensions policy upon the pensioner and saving populations. Tim has authored reports and his analysis is used to inform and illustrate others, considering both state and private pension systems. Recent topics have included tax relief, private pension saving, State Pension age, and understanding of the saving population. Tim joined the PPI in July 2015 from Legal and General where he spent nearly ten years contributing to a wide variety of actuarial modelling projects, from financial reporting to annuity pricing.



# Knowledge Sharing Seminars

## A guide to the UK pensions system

Venue: Kings College, 22 Kingsway, London WC2B 6LE

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Following on from the successful first session held in February, we have 2 further sessions scheduled:

**Tuesday 25th April 2017: 2pm—4.30pm**  
**Thursday 12th October 2017: 2pm—4.30pm**

The seminar will deliver an overview of the current UK pensions system, including the state pension, triple-lock, SPa, private pension provision, regulation, tax relief, Automatic Enrolment, and LISAs. Each session will reflect the current position of, and legislated future changes to, the UK pension system.

**Seminars will accrue 2 hours of CPD**

**Who should attend?** - The seminars are intended for people wanting to learn about the UK pensions policy framework, or to keep up to date on the changes in legislation. The seminars form an ideal part of new employees inductions.

*“I’ve recommended that any new starter on our team attend this course, I think it was brilliant and wish I had had the opportunity to attend when I started last year. This was an excellently presented overview. I really liked that it also provided context as to how the system has changed.”*

*Anna Sharkey—Policy Assistant ABI (PPI Silver Members)*

### Pricing Structure:

Category	Price + VAT (per person)
Non-Members	£150
Platinum Members	Free to attend (up to 3 places per session)
Gold Members	£25
Silver Members	£50
Associate Members	£100

**Additional places for platinum members above the allocated 3 will be charged at £200 + VAT**

**Places are limited to 25 per session, so early booking is advisable**

**Payment is due at time of booking and non-refundable, attendees can be changed**

**CPD certificates are available upon request**

100% of attendees would recommend the seminar to a colleague

To book your place(s) please contact Danielle Baker, Head of Membership & External Engagement  
[danielle@pensionspolicyinstitute.org.uk](mailto:danielle@pensionspolicyinstitute.org.uk)