

Pi Breakfast Webinar

GMP equalisation – controlling costs and making it happen

09.00am – 09.50am

Thursday, 13 May 2021

This is not about the possible options for GMP equalisation or the technical background. This is about how Trustee Boards can take control of their GMP project. Tackling this issue is one of the most complex and possibly expensive projects a pension scheme will ever have tackled.

GMP equalisation involves input from nearly all of your advisers – legal, actuarial, administrators. Trustee Directors face challenges in controlling costs and keeping members and the sponsor informed along the way.

We will therefore look at:

- **What project workstreams should be a key focus for Trustees?**
- **Where are the potential areas where costs can escalate and how do you keep control of the budget?**
- **What is the role of the various advisers and how do you keep the project integrated but avoid duplication?**
- **The arguments for and against outsourcing GMP equalisation projects.**
- **Getting the best value for money.**

Sarah Marshall is an experienced trustee with an actuarial background, who is currently facing the challenges of GMP equalisation, with restricted budgets, so will share her experience on how to get GMP equalisation done in a proportionate manner.

Lisa Riordan, who leads Pi's Governance services, has helped design project plans aimed at GMP equalisation management, as well as managing budgets across a number of schemes and projects. She will look not just at how to challenge your advisers but will also provide an update on the current outsourcing market.

Please email AShepherd@pjpg.co.uk if you would like to register for this webinar.

Webinar details:

Please do share this invitation with any colleagues you feel would benefit from attending.



Amanda Burden
Pi Partnership Group

AGENDA

09:00	Chair's introduction – Amanda Burden, Pi Partnership Group
09:05	Taking control as a Trustee – Sarah Marshall, Pi Partnership Group
09:25	Keeping the project on track – Lisa Riordan, Pi Partnership Group
09:40	Open forum
09.50	Finish

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