

## Aon Risk Settlement Conference:

### Pensions Endgame: How prepared are you?

London: Thursday 29 June 2023

Birmingham: Tuesday 4 July 2023

## Agenda

**09:00 Registration and Coffee**

**09:30 Chairs welcome**

**09:35 Market update**

As the risk settlement market continues to evolve, in particular with insurers increasingly receptive to insuring deferred liabilities, we take a look at the latest market trends in this topical update. A quick fire session to start the day!

**09:55 Managing mortality**

With an NHS under pressure and aftershocks of the pandemic still affecting mortality rates, we take a look at the detail on how this affects pension scheme liabilities and in turn insurer pricing of risk settlement transactions.

**10:10 Changing investment landscape**

Investment has risen up the agenda for many schemes bringing an array of complex challenges. As schemes near the endgame, refining their asset strategies will be key to ensuring a transaction remains affordable. In this session, we share our experience and insight into the impact the recent volatility has had on schemes ability to hedge their liabilities and exchange liquid assets for buy-in policies - as well as how we are helping schemes managed their illiquid allocations.

**10:40 Aon 2023 insurer survey - key findings**

In spring we conducted an in-depth survey of the active risk settlement insurers, gathering insights to how they see the bulk annuity market evolve over 2023 and beyond, and what their business priorities are. As part of this, we gathered detailed information on the types of schemes that will be of the strongest appeal to them. Find out the steps that you need to be taking to attract insurer attention.

**11:00 Insurer panel discussion**

In this panel session, we will discuss the output from our insurer survey and seek to understand the motives behind the key findings. We will also invite our attendees to challenge the insurers with the burning questions relevant for your journey to settlement.

**11:30 Refreshment Break**

**11:50 Are you due for some due diligence?**

Choosing the right insurer for your scheme may seem like a difficult task. With the support from our Due Diligence team, you can compare apples with apples and understand the key differences to suit your objectives. In this session, we will share insights to the regime in which the insurers operate and the relative strengths and weaknesses to consider as part of your transaction, including financial strength and ESG considerations.

**12:10 The great risk settlement game**

Attention grabbing headlines upon transaction completion are just a part of the story, with many aspects to consider before and after signing on the dotted line. During these interactive table exercises, we put you in the shoes of a transacting scheme to explore some of the hurdles and decisions involved on the journey to settlement.

**12:50 Life after transaction**

Following on from our table discussions, we take a look at the many potentially unwanted surprises that can emerge in the lead up to buyout and wind-up and how best to mitigate these risks. Speaking from experience, we will share stories of those who have navigated these issues and lived to tell the tale!

**13:10 Chairs closing comments**

**13:15 Lunch & Networking**