

29 June 2021

Risk Settlement Conference

Identifying Your Journey to Settlement

Agenda



AON

09:30 **Welcome address**

09:35 **Keynote address - Experiences of an Independent Trustee**

During this session we hear insights from an independent trustee who has been involved with multiple de-risking transactions involving schemes of differing sizes. Our guest speaker will share key learnings from all the stages of the journey to settlement, including: governance, member experience, investment strategy, data and benefits.

10:00 **Longevity on your journey to settlement – stormy seas or plain sailing?**

Aon experts will provide the latest longevity insights to ensure your journey to settlement stays on course, including lessons from the longevity rollercoaster ride of the past 25 years.

10:30 **Break**

11:00 **Market updates**

These bite-sized sessions will each be delivered within 7 minutes, introducing and sharing the latest updates on the key de-risking strategies. Helping you better understand what may be the most appropriate way to secure the future of your scheme for your members.

Buyouts / Buy-ins | Consolidation / Capital Backed Securities | Investment | Member Options | Longevity Swaps

11:35 **Break**

12:00 **Identifying where you are on your settlement journey**

Overview of the results of our 2021 Journey to Settlement survey, along with polling questions to help you identify which of the two focus groups you should join in the following session.

12:10 **Journey to Settlement Focus Groups**

Focus Group 1 - Planning your route

For those starting out on their journey to settlement. This focus group will cover the endgame targets available to schemes and the steps trustees and companies should take to ensure they start their journey to settlement in the right direction.

Focus Group 2 - Reaching your final destination

For those approaching their final destination. This focus group will cover the paths schemes need to take to be 'transaction ready' and the benefits of a well-prepared scheme.

13:00 **Break**

13:30 **Completing wind-up - Life after a settlement transaction**

Completing a settlement transaction does not mark the end of a scheme's life. Winding up a defined benefit scheme poses a number of risks and challenges. Trustees and sponsors will need an experienced adviser to navigate the pitfalls of the final phase of the journey. Aon's Buyout and Wind-up Services team will share insights of how to achieve efficient wind-up and minimise risks to you and your members.

13:55 **Closing remarks**

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