



# Welcome

The DC & Financial Wellbeing Virtual Conference will take place over the course of three weeks with each of the agenda items being recorded for those who are not able to join the live session.

You want the best fit for your pension scheme members – and your business. But how do you compare and do you have the right measures of success?

Join us to hear some of Aon's latest thinking as well as what others are doing across different aspects of DC pensions and Financial Wellbeing, with the all-important aim to improve outcomes.

This conference takes a truly member focussed approach and explores how we can support and influence them in making decisions to set and achieve their own retirement target based on their personal financial situation.

Register at [aon.co.uk/events](https://aon.co.uk/events)

# Conference Agenda

Session	Timings
<p><b>Get the measure of objectives</b></p> <p>Before you can understand how your scheme measures up, you have to have a set of objectives against which to measure success.</p> <p>In this session we explore the strategic trends in DC pensions, what different objectives might be set by schemes to ensure they are providing good outcomes and value for members and options in terms of how they might achieve those objectives.</p> <p>As part of this we will consider how schemes might factor in member's own needs and preferences.</p> <p><b>John Foster, Principal Consultant</b> <b>Steven Leigh, Senior Consultant</b></p>	<p>25 June 2020 11:45am – 12:30pm BST</p>
<p><b>Engagement – what's new?</b></p> <p>Reflecting the hidden mindsets causing poor engagement.</p> <p>Aon's recent DC survey shows that engagement with pensions remains epically low.</p> <p>To uncover why this is, we need to delve behind what members really think and feel about their retirement savings, and the barriers that are preventing good decisions.</p> <p>Using technology we can unlock insights into members behaviour as never before, and create new ways to tailor communications to our ever evolving audience of scheme members.</p> <p><b>Helen Payne, Principal, Member Experience</b> <b>Mark Carmen, Client Director, Engagement Innovations</b></p>	<p>25 June 2020 2:15pm – 3:00pm BST</p>
<p><b>It's not all about pensions</b></p> <p>COVID 19 is causing many employees to reflect on how they manage their money, not just in terms of retirement planning, but also their short term savings, debt management and financial protection for themselves and their families. Employers are responding to this with a significant uptick in those wanting to help their employees develop healthy financial habits.</p> <p>In this session we will look at how pensions fits within employees financial priorities and the tools that are available to engage employees in establishing healthy financial habits over the different stages of their career. This will include a demonstration of our new app, Well One Money, which allows employees to view their pension alongside their wider debt and savings and provides personalised coaching on some actions they could take to save money.</p> <p><b>Karina Klimaszewski, Senior Consultant</b> <b>Oliver Walker, Senior Partner</b></p>	<p>1 July 2020 9:45am – 10:30am BST</p>

Session	Timings
<p><b>Responsible Investment: no longer a nice to have</b></p> <p>The interest from DC savers in Responsible Investment has continued to snowball as has the focus from the regulator. In this discussion and Q&amp;A session, Aon's experts will consider the growing demand from the industry and scheme members for more action from trustees on Environmental, Social and Governance (ESG) factors and good stewardship.</p> <p>David Farrar from the DWP will provide further detail as to their expectation of DC schemes and trustees for the integration of ESG into investment strategies. This will be an interactive session with plenty of time for your questions.</p> <p><b>Chris Inman, Principal Consultant</b>  <b>Joanna Sharples, Partner</b></p> <p><b>Guest Speaker:</b> David Farrar, Climate governance and ESG – Department for Work and Pensions</p>	<p>1 July 2020  11:15am – 12:00pm BST</p>
<p><b>Can theory ever become practice for DC investing in the UK?</b></p> <p>Aon experts will question what it means to really improve member outcomes, can the theory behind innovative investment strategies work in the UK?</p> <p>We will also explore how the structure of lifestyle investing and the underlying asset classes and approaches to member engagement can be improved.</p> <p><b>Chris Inman, Principal Consultant</b>  <b>Joanna Sharples, Partner</b></p>	<p>8 July 2020  9:45am – 10:30am BST</p>
<p><b>Optimising your resources</b></p> <p>The UK DC market is changing rapidly with increasing levels of regulation and auto enrolment leading to widespread market developments that are providing new options for employers when it comes to DC pension delivery.</p> <p>The session will explore the issues that are driving employers to review their DC delivery models and share data on the expected future shape of the UK DC market.</p> <p>We will also explore the main options for delegating aspects of DC delivery and how these may impact employers and members.</p> <p><b>Tony Pugh, Head of Aon DC Solutions – EMEA</b>  <b>Gareth Marsh, Principal</b></p> <p><b>Guest speaker:</b> Stephen Barnett, Director of Global Compensation – Brambles</p>	<p>8 July 2020  11:15am – 12:00pm BST</p>

## About Aon

Aon plc (NYSE:AON) is a leading global professional services firm providing a broad range of risk, retirement and health solutions. Our 50,000 colleagues in 120 countries empower results for clients by using proprietary data and analytics to deliver insights that reduce volatility and improve performance.

Aon Solutions UK Limited is authorised and regulated by the Financial Conduct Authority.

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Registered office:

The Aon Centre | 122 Leadenhall Street | London | EC3V 4AN

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