

IAPF SPRING CONFERENCE

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| Time | Subject | Speaker |
|---------|---|--|
| 9.00am | Welcome | Jerry Moriarty, CEO, IAPF |
| | Regulatory Update | Grace Guy, Head of Supervision and Enforcement, Pensions Authority |
| | Master Trusts – Market Developments & Insights | Richard Jones, Director of Product, Pricing and Distribution, New Ireland |
| | What is the Outlook for Property? | Liam Stack, Chair, IAPF Investment Committee, Caroline McCarthy, Head of Fund Management – IPUT, Nick McNair, Senior Vice President and Portfolio Manager – PIMCO |
| 10.45am | Coffee Break | |
| 11.15am | Welcome Back | Ann Prendergast, IAPF Chairperson |
| | Global Macro Outlook | Leonie McCann, Senior Portfolio Manager in the Multi Asset Group, Irish Life Investment Managers |
| | Macro Outlook – Impact on Equities, Fixed Income, Alternatives - Panel Discussion | Brian Delaney, Senior Portfolio Manager, Aon Investments Limited, Aisling Doherty, Partner, Senior Fixed Income Portfolio Manager, Mercer Global Investments, Leonie McCann, Senior Portfolio Manager in the Multi Asset Group, Irish Life Investment Managers |
| | What does all this mean for DB and DC schemes? | Panel Chair: Fiona Furlong, IAPF Investment Committee Panelists: Thomas Donohoe, Ger Fitzgerald, IAPF Investment Committee |
| 1.00pm | Lunch | |

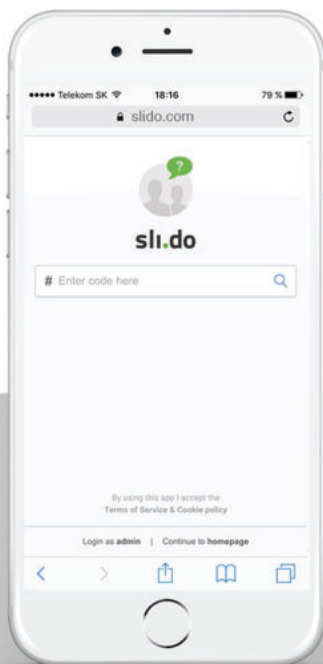
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CPD

This Conference will be allocated CPD hours by the IAPF for on-going trustee training requirements. We received 3.5 hours CPD from LIA (LIA15760_2023). We await confirmation from IOB (TBC) and IIPM. If you have a query in relation to CPD, please contact the relevant bodies.

SPEAKERS



Jerry Moriarty | CEO | IAPF

Jerry Moriarty is CEO of the IAPF which represents pension savers in Ireland. Its members are responsible for some €128.7bn in retirement savings and aims to ensure people in Ireland can have pensions that are secure, fair and simple. Jerry is Vice-Chair of PensionsEurope and chairs its Standing Committee on Future of Pensions. He is Chairperson of SIF Ireland (the Irish Sustainable and Responsible Investment Forum) and is a member of the European Insurance and Occupational Pensions Authority's Occupational Pensions Stakeholder Group.



Grace Guy | Head of Supervision and Enforcement | Pensions Authority

Grace Guy is Head of Supervision and Enforcement with the Pensions Authority, the Irish Regulator for occupational pension schemes and PRSAs. The Supervision and Enforcement Unit is responsible for ensuring compliance with the Pensions Act through forward-looking risk-based supervision and instigates prosecutions and other sanctions where breaches are found to have occurred. Grace joined the Authority in 2010 as a legal adviser and subsequently ran the Authority's Legal Unit. She is a qualified solicitor and has advised on all aspects of the Authority's legal remit. She represents the Pensions Authority at various national and international pensions fora including the OECD's International Organisation for Pensions Supervisors (IOPS). Grace is a former member of the Law Society Pensions sub-committee and a former council member of the APLI (the Association of Pensions Lawyers in Ireland).



Richard Jones | Director of Product, Pricing and Distribution | New Ireland

Richard joined New Ireland in 2021 as Director of Product, Pricing and Distribution. He has a wealth of industry expertise from a career in Life & Pensions and has held senior executive roles with a range of insurers and banks both Internationally (US, UK and Australia), as well as in Ireland. Richard has strong commercial experience covering Product, Distribution, Transformation and Strategy. Before joining New Ireland, Richard was the Head of Product, Marketing and Pricing with Aviva. Prior to this he held a number of senior commercial roles with National Australia Bank. Richard also has extensive experience in Group Defined Contribution Pensions, having helped establish NEST (one of UK's largest auto enrolment pension schemes), as well as fund management having worked with Fidelity Investments in Boston.



Liam Stack | Chairperson | IAPF Investment Committee | abrdn

Liam is Head of Distribution, Ireland for abrdn. He leads the team responsible for both existing clients and new business across Institutional, Wholesale and Retail channels. He is currently the Chair of the IAPF Investment Committee.



Caroline McCarthy | Head of Fund Management | IPUT Real Estate Dublin

Caroline McCarthy joined IPUT in 2020 as Head of Fund Management with responsibility for overseeing fund management activities, fund strategy and taking a lead role in investor relations, reporting and business development. Caroline is an Associate of the Royal Institution of Chartered Surveyors and a Member of the Society of Chartered Surveyors Ireland and has over 25 years' experience in investment strategy and deployment of capital across property sectors.



Nick McNair | Senior Vice President and Portfolio Manager in the Commercial Real Estate Team | PIMCO

Mr. McNair is a senior vice president and portfolio manager in the commercial real estate team in the London office. Prior to joining PIMCO in 2020, he served with Deutsche Bank's European commercial real estate group for 14 years, most recently as managing director and head of origination for Europe. Previously, he held various underwriting, asset management, and workout roles at Deutsche Bank. Prior to this he was on the structured finance team at Royal Bank of Scotland, and earlier in his career in real estate he was a chartered surveyor and chartered arbitrator. Mr. McNair has over 25 years of pan-European real estate and finance experience in diverse debt, equity, and advisory roles.



Ann Prendergast | Chairperson | IAPF | Head of State Street Global Advisors

Ann Prendergast is a Senior Managing Director and Head of State Street Global Advisors Europe Ltd. In her role, Ann has responsibility for SSGA's business in the European Union which includes portfolio management, distribution, product development, fund management and operations. This business operates from 2 investment centres and a number of distribution branches. Prior to this role, Ann was Head of State Street Global Advisors Ireland. She joined the organisation as a relationship manager in 2000 and became head of this area in 2010, with responsibility for managing the firm's engagement activities with a diverse client base. Previously Ann worked with the Bank of Ireland Group in both their fund administration and private banking divisions. Ann holds a Business Studies Degree from the University of Limerick and is a member of the Association of Chartered Certified Accountants (ACCA). She is Chairperson of the Irish Association of Pension Funds and is on the Board of the National Gallery of Ireland.



Leonie McCann | Senior Portfolio Manager in the Multi Asset Group | Irish Life Investment Managers

Leonie joined ILIM in 2020 and is a Senior Portfolio Manager in the Multi Asset Group. Prior to joining ILIM, Leonie worked for IBM in their in-house asset management team covering the non-US pension plans. This covered strategic asset allocation, manager selection and portfolio management of a number of pension plans and in-house funds. Before this Leonie worked with Davy in their Private Clients business and spent a number of years as an investment consultant with Willis Towers Watson. Leonie earned a B.A. Honours degree from Trinity College Dublin in Economics and Philosophy, a Masters in Finance from Cass Business School London and is a CFA charterholder.



Brian Delaney | Senior Portfolio Manager| Aon

Brian has over 25 years international investment experience and has held senior roles in multi-asset portfolio management, asset allocation, equity research and sales during that time. Brian has been with Aon for the past 15 years and is a senior member of Aon's fiduciary portfolio management team, where he is responsible for investment strategy and portfolio management of Aon's multi-asset strategies in Ireland and the UK. Brian holds Bachelor of Commerce and Master of Business Studies qualifications from University College Dublin and earned the CFA Charter holder designation in 2002



Aisling Doherty | Partner, Senior Fixed Income Portfolio Manager | Mercer Global Investments

Aisling Doherty, Partner, Senior Fixed Income Portfolio Manager, Mercer Global Investments, is the lead Fixed Income Portfolio Manager for Mercer's Investment Solutions business in EMEA and Asia. Aisling and her team oversee portfolio construction and manager selection for \$40bn of active and passive fixed income strategies. Aisling has spent over a decade in the asset management industry; managing, designing and building investment solutions. Aisling joined Mercer in Toronto, as Strategic Projects and Partnerships Leader, and led the design and delivery of Mercer's OCIO platform for DC pension plans in Canada. Aisling is a Fellow of the Institute and Faculty of Actuaries UK (FIA), and a Fellow of the Society of Actuaries in Ireland (FSAI). Aisling is a previous Steering Committee member of the Toronto Responsible Investment Committee, a cross organization working group driving forward sustainable and responsible investment practices amongst Canadian institutional investors. Aisling holds an honor BSc in Financial and Actuarial Mathematics and a Post Graduate Qualification in Actuarial Applications, both from Dublin City University, Ireland.



Fiona Furlong | IAPF Investment Committee | Vice President, Account Manager | PIMCO

Ms. Furlong is a vice president and account manager in the Dublin office, focusing on clients in the U.K. and Ireland. Prior to re-joining PIMCO in 2020, she worked as an investment manager at LGIM, focusing on fixed income strategies. She previously worked at PIMCO in London, most recently covering multi-sector fixed income in the product strategy group, and previously on the institutional account management team. She has seven years of investment experience and holds a dual bachelor's degree from Dublin City University and North-eastern University in international business and finance.



Thomas Donohoe | IAPF Investment Committee | Investment Director | Insight Investment Management

Thomas joined Insight in August 2019 with responsibility for overseeing investment management activities associated with Insight's funds. Thomas is the Designated Person for Investment Management Oversight and the Chief Investment Officer for Insight Investment Management (Europe) Ltd. Prior to joining Insight, Thomas had over 10 years' experience as an investment consultant with LCP and Aon Hewitt providing specialist advice to institutional pension scheme trustees on investment strategy, risk management and investment manager research. Thomas graduated from University College Dublin with a Bachelors in Actuarial & Financial Studies (first class honours) and is a Fellow of the Institute and Faculty of Actuaries.



Ger Fitzgerald | IAPF Investment Committee | Head of Investment Strategy | Invesco Ltd

Ger is Head of Investment Strategy for Invesco Ltd and is responsible for the successful delivery of investment solutions across employee benefits and wealth management. With over 15 years' industry experience, Ger advises Invesco clients and trustee boards in relation to their bespoke requirements surrounding asset allocation, investment selection and risk management. Ger is a member of Invesco's Global Macro Council and also sits on their Investment Committee which is responsible for overseeing investment processes, steering manager research and developing thought leadership. Prior to joining Invesco in 2015, Ger worked in Mercer as an investment consultant to a range of defined benefit and defined contribution pension schemes. Ger is a qualified Actuary, Chartered Enterprise Risk Actuary, Qualified Financial Advisor and Pension Trustee Practitioner.

DELEGATE LIST

| First Name | Last Name | Company |
|-------------------|------------------|--|
| Aaron | Gaynor | Irish Life Assurance |
| Adrian | Garvin | Amundi Ireland Limited |
| Aedin | Kenealy | Guinness Ireland Group Pension Scheme |
| Aisling | Doherty | Mercer |
| Alan | O'Dowd | Amundi Ireland Limited |
| Alan | Kinsella | Irish Life Corporate Business |
| Alex | Williams | Microsoft Ireland |
| Amy | Peat | IAPF |
| Andrew | Nugent | Pensions Authority |
| Ann | Prendergast | State Street Global Advisors Europe |
| Anne | Maher | Anne Maher |
| Anthony | Walsh | ESB Pensions |
| Aoife | O'Halloran | Goldman Sachs Asset Management International |
| Barry | Ennis | Eppione Limited |
| Barry | Sinnott | Irish Life Corporate Business |
| Barry | Holmes | Royal College of Surgeons in Ireland |
| Barry | O'Leary | State Street Global Advisors Europe |
| Brendan | Lee | Utmost Corporate Solutions |
| Brendan | Johnston | Zurich Life Assurance plc |
| Brian | Delaney | Aon |
| Brian | Sexton | Invesco Ltd |
| Brian | Morrissey | Irish Life Investment Managers |
| Brian | Sullivan | New Ireland Assurance Company plc |
| Bruce | Mullen | Trustee Principles Limited |
| Carol | Leonard | Mercer |
| Caroline | Giles-Lee | Independent Trustee Limited |
| Caroline | McCarthy | IPUT plc |
| Cathal | Buckley | Bank of Ireland Group |
| Catherine | Austin | McCann FitzGerald LLP |
| Cecilia | McAllister | Department of Finance |
| Charles | Coase | daa |
| Chris | Hawketts | PIMCO Europe GmbH Irish Branch |
| Christine | O'Callaghan | Allied Irish Banks plc |
| Christine | Roche-Burton | IBM Ireland Ltd |
| Ciara | Quinn | ESB Pensions |
| Ciaran | Diamond | Department of Employment Affairs and Social Protection |
| Ciaran | Martin | Navigate Master Trust, Invesco Limited |
| Claire | Ryan | ESB Pensions |
| Conor | Dunne | Department of Employment Affairs and Social Protection |
| Conor | O'Reilly | Zurich Life Assurance plc |
| Cormac | Molloy | Schroders |
| Damien | Varley | Haven Green |
| Daniel | Moloney | Allied Irish Banks plc |

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| Deirdre | Cummins | Arthur Cox |
| Deirdre | Ross | IAPF |
| Derek | McCabe | Irish Life Corporate Business |
| Diarmuid | Murphy | ESB Pensions |
| Dominic | Coyle | |
| Dominic | Coyle | The Irish Times Ltd |
| Donal | Keating | Irish Life Investment Managers |
| Eamon | O'Leary | daa |
| Edward | O'Hanlon | Acuvest Limited |
| Elaine | Colman | Construction Executive Retirement Savings |
| Ellen | Bailey | Pensions Authority |
| Elma | Fox | Law Debenture Pension Trustees Ireland |
| Emer | Kirk | Financial Planning Standards Board Ireland DAC |
| Emma | O'Mahony | National Treasury Management Agency |
| Eugene | Murphy | Ervia |
| Fintan | O'Reilly | Cadbury Ireland Pension Trust Company Ltd by Guarantee |
| Fiona | Furlong | PIMCO Europe GmbH Irish Branch |
| Frances | McNally | Construction Executive Retirement Savings |
| Francois | van der Merwe | PIMCO Europe GmbH Irish Branch |
| Garrett | O'Malley | Invesco Ltd |
| Gary | Morrissey | WTW |
| Gavin | Howlin | WTW |
| Gerald | Fitzgerald | Invesco Ltd |
| Gerry | Armstrong | ICOS/DEA Pension Trustees Ltd |
| Grace | Guy | Pensions Authority |
| Ian | Moynihan | Irish Life Assurance |
| Ian | Devlin | William Fry LLP |
| Isabel | Vaughan | New Ireland Assurance Company plc |
| James | Waldron | Irish Life Assurance |
| James | Skehan | National Federation of Voluntary Service Providers Supporting People with Intellectual Disability |
| James | Montefiore | Schroders |
| James | Fitzsimons | State Street Global Advisors Europe |
| Jamie | McConville | Zurich Life Assurance plc |
| Jerry | Moriarty | IAPF |
| Jim | Connolly | Allied Irish Banks plc |
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| John | Gethin | KBC Bank Ireland |
| John | Griffith | KBI Global Investors |
| John | Cremin | The Aon Ireland MasterTrustee DAC |
| Jonathan | Daly | Zurich Life Assurance plc |
| Katrina | O'Connell | Smart Pension |
| Kelley | McMenamin | IAPF |
| Ken | Mortimer | Utmost Corporate Solutions |
| Kevin | O'Connor | Irish Life Assurance |
| Kieron | Garland | VHI Group Services DAC |
| Leonie | MacCann | Irish Life Investment Managers |

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| Leslie | Ruttle | New Ireland Assurance Company plc |
| Liam | Stack | abrdrn |
| Lisa | Buckley | Zurich Life Assurance plc |
| Louise | White | Irish Life Investment Managers |
| Mairead | O'Mahony | Aon |
| Marie Louise | Colgan | IBM Ireland Ltd |
| Martin | O'Hora | Goodbody |
| Martin | O'Callaghan | Irish Pensions Trust Limited |
| Martin | Dobey | KPMG |
| Martin | Ørsted | Microsoft Ireland |
| Mary | Feeney | IBM Ireland Ltd |
| Mary | Hutch | Zurich Ireland Master Trustee Designated Activity Company |
| Meadhbh | Costello | Ibec |
| Michael | Curran | Amundi Ireland Limited |
| Michael | O'Sullivan | Irish Life Corporate Business |
| Micheal | Kerley | Legal & General Investment Management |
| Mingfeng | Lyu | Pension Policy Research Group |
| Muirinn | O'Neill | BlackRock Asset Management Ireland Limited |
| Neville | Maxwell | New Ireland Assurance Company plc |
| Niamh | Williams | Department of Finance |
| Nichola | Tuite | New Ireland Assurance Company plc |
| Nick | McNair | PIMCO Europe GmbH Irish Branch |
| Nigel | Corkery | GlaxoSmithKline (Ireland) Ltd |
| Noel | Friel | ESB Pensions |
| Oisin | Parsons | eircom Superannuation Fund |
| Pat | Mooney | First Active Pension Scheme |
| Pat | McGinley | IPUT plc |
| Patrick | Leonard | FIL Transaction Services Limited |
| Patrick | Cosgrave | New Ireland Assurance Company plc |
| Paul | Sutton | FNZ Ireland |
| Paul | Hallam | PM Group |
| Paul | Dunne | State Street Global Advisors Europe |
| Paul | Hughes | Xerox (Ireland) Limited |
| Peter | Griffin | Navigate Master Trust, Invesco Limited |
| Phelim | Kelly | Irish Life Corporate Business |
| Philip | Smith | Arthur Cox |
| Philip | Curtis | Royal College of Surgeons in Ireland |
| Rachel | McGovern | Brokers Ireland |
| rebecca | shanahan | Irish Life Corporate Business |
| Richard | Kelly | Legal & General Investment Management |
| Richard | Jones | New Ireland Assurance Company plc |
| Rickard | Mills | KBC Bank Ireland |
| Riona | Norton | Allied Irish Banks plc |
| Rita-Anne | Keyes | Trident Consulting |
| Robert | Woods | KPMG |
| Roisin | Kelly | Irish Life Corporate Business |
| Ronan | O'Riordan | Schroders |

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| Ronan | Smith | Verus Advisory Limited |
| Rose | Leonard | Zurich Life Assurance plc |
| Rose Anna | Roche | Mercer |
| Sarah | Ryan | Allied Irish Banks plc |
| Sarah | McCague | Arthur Cox |
| Sharon | Houstoun | BlackRock Asset Management Ireland Limited |
| Stephen | McCarthy | daa |
| Sylwia | Bien | Construction Executive Retirement Savings |
| Thomas | Brosnan | AA Ireland Pension Scheme |
| Thomas | Donohoe | Insight Investment |
| Thomas | Synnott | Zurich Life Assurance plc |
| Tim | Hodgson | BlackRock Asset Management Ireland Limited |
| Tony | Doyle | Allied Irish Banks plc |
| Tony | Fleming | EirGrid |
| Trish | Barrett | Zurich Life Assurance plc |
| | Sabnani | |
| Vijay | Melwani | ESB Pensions |
| Yvonne | Dunne | Central Bank of Ireland |