

# Pensions on Divorce Seminar 2011

The unmissable seminar for all family lawyers and other professionals advising in ancillary relief cases involving one or more pensions

## LONDON

**Friday 4th February 2011**  
Copthorne Tara Hotel,  
Kensington,  
London, W8

## SPEAKERS

- David Salter
- Maggie Rae
- Geoffrey Wilson

## FEES

**£245 + VAT\*** (Family Law Week  
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# Pensions on Divorce Seminar 2011

Lime Legal has assembled three of the country's leading experts to present an authoritative, practical seminar designed to equip family lawyers and other professionals with the knowledge of law, practice and procedure that they need for family law cases involving pensions.

Two of the country's foremost legal experts combine with a respected, experienced actuary to present a day comprising substantive presentations with speaker-led case studies to bring the subject to life and to help get to grips with this important aspect of ancillary relief cases.

## Who should attend?

- Family Lawyers: solicitors, barristers and legal executives
- Actuaries
- Accountants
- IFAs
- Pension Arrangement Administrators

## THE BOOK

### PENSIONS ON DIVORCE: LAW, PRACTICE & PRECEDENTS (Lime Legal)

The leading text book for family lawyers and other professionals involved in pensions in the context of divorce cases, is an essential addition to your firm's library (though you will want to keep your copy close to your side).

#### THE AUTHORS:

**David Salter** Partner and Joint Head of Family Law, Mills & Reeve LLP

**Maggie Rae** Partner, Head of Family Law, Clintons

**Robin Ellison** Head of Strategic Development for Pensions, Pinsent Masons

#### INCLUDES:

- Valuation
- Disclosure
- Pension Sharing
- Pensions and s.25 MCA 1973
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- Offsetting
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## SPEAKERS

**David Salter** Partner and joint national head of family at Mills & Reeve LLP. David is co-author of the leading textbook *Pensions on Divorce: Law, Practice & Precedents* (Lime Legal). He is a former national chairman of Resolution (then SFLA) and is President of the International Academy of Matrimonial Lawyers. He is widely acknowledged as one of the country's leading experts on pensions law in the context of ancillary relief. He has been praised in *Chambers UK Directory* for his pre-eminent knowledge of matrimonial finance, particularly with regard to pensions and complex financial matters. He is also a director of Penfam, a company which provides specialist pensions services including pensions reports to family lawyers. David is also a member of the Family Procedure Rules Committee.

**Maggie Rae** Partner and head of family law at Clintons. Maggie is also co-author of *Pensions on Divorce: Law, Practice & Precedents* (Lime Legal). She has lectured at Warwick University. She is a member of Resolution (formerly the Solicitors Family Law Association) and the International Academy of Matrimonial Lawyers. She was a member of the Government's Consultation Panel on Pensions and Divorce, and a special advisor to the House of Commons Social Security Select Committee in relation to pensions and divorce. She is also a director of Penfam, a specialist company providing pensions services to family lawyers.

**Geoffrey Wilson** FIA MAE MEWI has over 35 years actuarial and investment experience. He is one of the principals of Excalibur Actuaries who work closely with Penfam to provide pensions and divorce expert reports service. Geoffrey has written extensively in technical journals including on pensions and divorce. He has acted as expert adviser to courts and to government agencies on pension issues. He is a member of the Association of Consulting Actuaries, a practising member of the Academy of Expert Witnesses, and a founding member of the Expert Witness Institute.

## Family Law Week

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## Programme

09.15–10.00

### Registration

10.00–10.45

### A Decade of Pension Sharing

*David Salter*

- The court's powers in outline
- A success story?
- The common and the less common mistakes
- Pension Sharing Charges – how can you identify excessive charging and what can you do about it
- What does 'Equality' mean in pension sharing terms?
- Future developments

10.45–11.15

### Firm Foundations: Getting the Pensions Information You Need

*Maggie Rae*

- What information must pension providers give and why is it important?
- Using the Pension Inquiry Form (Form P)
- What Forms E and P do not tell you and why it may be important
- Getting further information and advice
- Dealing with uncooperative pension scheme administrators

11.15–11.30

### Refreshments

11.30–12.10

### The Impact of New Pensions Developments

*Geoffrey Wilson*

- Changes to the state pension scheme
- The move from final salary schemes
- The impact of the new contributions regime

12.10–12.35

### The Pension Protection Fund: Changes That Family Lawyers Need To Be Aware Of

*Maggie Rae*

- Background: the Fund's *raison d'être*
- The new procedure
- Pension Compensation Orders
- Attachment Orders

12.35–13.00

### Practical Case Study I: Which Solution is Appropriate and Why

*David Salter, Maggie Rae and Geoffrey Wilson*

- Pension share or offset?
- Undisclosed pensions
- Form E considerations
- Do the figures look right? – what can you do if they don't and who to turn to if you simply don't know

13.00–14.00

### Lunch

14.00–14.45

### Pensions Valuations and Revaluations

*Geoffrey Wilson*

- Changes in valuation methodology
- The switch from RPI to CPI
  - exactly what has happened?
  - how it will impact on family law cases
- Impact on private sector schemes
- Public sector schemes changes
- HM Forces Pensions and special cases
- Getting expert advice

14.45–15.30

### Practical Speaker-led Case Study II

- The factual matrix
- How to spot the problems
- What to do about them
- Suggested solutions
- Special cases requiring special care

15.30–15.45

### Refreshments

15.45–16.30

### Case Law and Rules Update

*David Salter*

- The impact of *Radmacher*
- *H v H*
- The latest Pensions Ombudsman determinations
  - what they determined
  - the implications for the family lawyer
- Family Procedure Rules 2010 Part 9 Chapters 8 and 9

16.30–17.00

### Ask the Experts

Your opportunity to ask questions of the expert speakers and to learn from the experiences and comments of fellow delegates.

17.00

### Close of Seminar

