



**100 women in
hedge funds®**

**Education Session No. 600:
Unpacking the 2016 Budget - Implications on Long Term Care, Savings and Pensions**

March 16, 2016 at 6:30 PM
London

On March 16, the UK Chancellor of the Exchequer will deliver the 2016 Budget to Members of Parliament. The market is anticipating notable changes that will affect taxation and pensions in the UK. These changes will invariably have an impact on the way we plan for the future.

Join our panelists as they unpack the 2016 Budget and discuss the magnitude of its effects on long term care, pensions, and savings for the future.

Participants

Sophie-Jane Keelaghan, St. James's Place Wealth Management

Dawid Konotey-Ahulu, Redington

Ian Price, St. James's Place Wealth Management

Baroness Patience Wheatcroft, *Moderator*, Fiat Chrysler; St. James's Place Wealth Management Plc

Event Details

Date: March 16, 2016

Time: 6 PM Registration.

We will begin *promptly* at 6:30 PM; please arrive early. Since it is disruptive to everyone when latecomers enter the session, those arriving after an education session has begun will only be admitted at the discretion of 100WHF and the host. Please note the start time on this invite and plan to arrive early.

Networking and cocktails will follow.

Host: St. James's Place Wealth Management Group

Location: Foresight Group

The Shard, 32 London Bridge Street, **London**, SE1 9SG, United Kingdom

RSVP: [RSVP Now](#)

If you have any questions about this event, please contact the [London Education Events](#) committee.

This event is NOT FOR ATTRIBUTION. All 100WHF events are private events and we require that no one reports publicly on any aspect of them.

Admission to this event is free, but there is a £20 charge if you register and do not attend (even if you cancel in advance). No-show proceeds will be donated to SkillForce, the beneficiary of 100WHF's most recent UK philanthropic initiatives.

If you have no-show fees in arrears, the system cannot register you for an event. You can view and pay for any outstanding no-show fees online from your [Member Profile](#)

Space is limited. No walk-ins will be permitted.

Biographies

Sophie-Jane Keelaghan, Partner, St. James's Place Wealth Management

Sophie-Jane is a Partner of St. James's Place Wealth Management where she runs her own practice. Although Sophie-Jane offers all of her clients' holistic financial planning advice, her true passion is advising professional women in areas such as retirement planning and managing their income effectively, to help them achieve their long term goals.

Sophie-Jane is an active presenter, and over the last 6 years has spoken to groups including Women on the Wharf, Women @ Reuters and Women in Property.

By working with her clients to de-jargonise their payslips and pension statements, and ensure they spend time reviewing their personal investment strategy on a regular basis, Sophie-Jane finds that her clients have a sense of calm and a feeling of personal control.

Sophie-Jane began her career in London as a Chartered Surveyor, qualifying as a commercial real estate specialist at CB Richard Ellis, where she valued properties held in institutional property funds, before joining the Global Corporate Services team, where she was the Global Account Co-ordinator for Barclays Capital with their occupational real estate portfolio. In 2008, Sophie-Jane became the first programme graduate to receive an 'Outstanding Services to Clients Award'.

With few professionally qualified, female, wealth managers, Sophie-Jane has developed a business where she is able to offer women an accessible and fresh approach to financial planning.

The title 'Partner' is the marketing term used to describe St. James's Place representatives.

Dawid Konotey-Ahulu, Co-CEO, Redington

Dawid is a founder of investment consultancy, Redington. The firm advises pension funds, insurance companies and wealth managers on risk management and investment strategy and has around £410 billion of assets under consultancy. He is also founder of mallowstreet, a platform that brings the pensions industry together for the purposes of collaboration and knowledge sharing. mallowstreet's membership is responsible for over £2 trillion of pension scheme assets. In 2014, Dawid launched Partnership for Change ("P4C"), a not-for-profit initiative designed to address the long term savings challenge. P4C facilitates innovation in this field through collaboration across the Pensions & Savings sector, the Long Term Care industry, the National Health Service and Government. Dawid qualified as a barrister in 1987. He joined an investment bank in 1990 and worked as a banker in the capital markets until 2006. Whilst at Merrill Lynch, where he was responsible for the bank's Pensions Advisory Team, he transacted the industry's first LDI transaction in 2003. He is a regular commentator and blogger on issues concerning pensions and long term care and he is also the founder of PitchCamp which teaches young people the dark art of public speaking.

Ian Price, Divisional Director for Pensions, St. James's Place Wealth Management

Ian has spent over 30 years working in the Pensions industry. He joined St. James's Place in September 2004 as Head of Pensions, he is now a Divisional Director.

His role involves all aspects of Pensions marketing including corporate pensions, and he presents widely throughout the UK. Ian maintains an understanding of all aspects of the legislative changes affecting pensions in order to ensure that clients of St. James's Place are fully aware of current rules and guidelines.

Ian regularly comments on and writes for the industry press on all pension issues. He spent four years on the Pensions & Savings Committee of the ABI.

Baroness Patience Wheatcroft, Non-Executive Director, Fiat Chrysler; St. James's Place Wealth Management Plc

Patience is a non-executive director of Fiat Chrysler and of St. James's Place Plc. She is Chairman of the Financial Times Complaints Commission and an advisory board member of Bell Pottinger, the public relations consultancy. She is also a deputy chairman of the British Museum. She was Business and City Editor of The Times for nine years before taking up the Editorship of the Sunday Telegraph. Then she decided to see business from the other side, leaving journalism to join the boards of Barclays and the property company, Shaftesbury. In July 2009, she returned to journalism, as Editor in Chief of the Wall Street Journal Europe. She left that role at the beginning of 2011 to become a working Conservative peer. In the Lords she sits on the Economic Affairs Committee.



ST. JAMES'S PLACE

WEALTH MANAGEMENT

About St. James's Place Wealth Management Group

St. James's Place Wealth Management is a FTSE 100 company recently awarded 'Best Wealth Manager for Tax Efficiency and Advice' by FT/Investors Chronicle, specialising in delivering face-to-face wealth management advice to individuals, trustees and businesses. As well as addressing simple and straightforward issues such as life assurance, St. James's Place Wealth Management can help to resolve more complex problems for clients, whether it be investment planning, Inheritance Tax or retirement planning.

In general, the firm provides reliable and expert advice for individuals and businesses seeking to achieve four principal financial objectives:

- Build and preserve capital
- Manage cash and borrowings
- Protection against financial risk
- Manage businesses more effectively

About 100 Women in Hedge Funds (www.100womeninhedgefunds.org)

100 Women in Hedge Funds is a global, practitioner-driven non-profit organization serving over 13,000 alternative investment management investors and professionals in 20 locations through educational, professional leverage and philanthropic initiatives. Formed in 2001, 100 Women in Hedge Funds has hosted over 500 industry education events globally, connected more than 350 senior women through Peer Advisory Groups and raised over \$38 million for philanthropic causes in the areas of women's and family health, education and mentoring.