

30th and 31st January 2014

Woodlands Park Hotel, Woodlands Lane, Stoke D'Abernon, Cobham, Surrey KT11 3QB



Helen Crofts
Chair and co-founder, TWIN

TWIN's first meeting of 2014 will be taking place at the Woodlands Park Hotel near Leatherhead in Surrey – with autumn definitely in the air, catching up with colleagues and making new connections around that great big log fire is definitely something to look forward to! We have a mixed bag of an agenda for you, guaranteed to provoke thoughts and ideas, bring you up to speed on industry matters and introduce you to influential, inspirational or maybe just purely useful folk.

So please do book your place early. Patricia and I look forward to seeing you in the New Year.

Thursday January 30th 17.35 - 19.00



Karen Kelly, Independent Financial Adviser

"The Retail Distribution Review in action"

Just over a year after the long-awaited implementation of the Retail Distribution Review, how has life changed for those at the coal-face of our industry? Karen is a Fellow of the Institute of Actuaries and also an Independent Financial Advisor and will be sharing her thoughts on the extent to which the RDR has met its original objectives — and the unforeseen casualties it's taken along the way. It's a contentious topic so be prepared for a lively debate!

Thursday January 30th After dinner speaker



Margaret Kirby Founder, Legacare

"The Legacare Story"

Legacare is a pioneering legal charity, founded by solicitor Margaret Kirby in 2010. Legacare's aim is to provide peace of mind, dignity and quality of life to people diagnosed with cancer and other life threatening illnesses by providing free legal services to those in need.

Early in 2013 Legal and General announced a new funding partnership with LegaCare allowing Margaret's team of pro bono solicitors – who will take calls day and night – to help twice as many clients in 2013.

Friday January 31st 08.40 - 09.50



Jackie Wells Independent Consultant

"The Aldermanbury Declaration – measuring the effects of raising professional standards"

Professionalism is high on the agenda for Government, regulators and companies following recent exposures of unethical behaviour among a number of occupations and professions. In financial services and insurance markets, moves to improve professional standards are well advanced with the FSA's Retail Distribution Review (RDR) and an insurance industry initiative known as the Aldermanbury Declaration (AD). The latter is a voluntary scheme supported by insurers, brokers and other service providers in the general insurance sector.

In 2012, the CII set about establishing a baseline measure of outcomes for personal and business general insurance customers. Jackie has been closely involved in the project and will describe efforts to develop an index to measure the effects of higher professional standards.



Tamara Williams
The Gap Partnership

"Negotiation: one of the most important skills in business"

Negotiation is one of the most important skills in business, according to negotiation experts "The Gap Partnership". Whatever your role, successful negotiation requires a broad range of skills - but are men better negotiators than women? Here to give us her views on this touchy topic – as well as tips on how to negotiate more successfully - is Tamara Williams, Negotiation Consultant with The Gap Partnership.

The Gap Partnership do "nothing but negotiation". Operating in 13 languages all over the world, they are the preferred global partner for over 500 corporate clients, including many FTS 250 and Fortune 500 organisations.

Friday January 31st 11.25 – 12.35



Nick Kirwan Director, International Longevity Centre

"The Protection Market in 2013: a personal perspective"

Nick will be known to many of you as former Assistant Director for Health & Protection at the Association of British Insurers. Prior to his seven years with the ABI he was protection marketing director at Scottish Widows. Nick has recently joined TWIN member The International Longevity Centre and has agreed to share with us his "warts and all" views on the current state of the protection industry.

He's an engaging and entertaining speaker and will no doubt provide ample food for thought.

Friday January 31st 12.35 – 13.45



Caroline Scullion Taylor Wessing

"The Jackson Reforms: here's what you need to know"

1 April 2013, saw the implementation of significant changes to the civil law of England and Wales in the form of legislation relating to the costs of civil litigation. Known as "The Jackson Reforms" after Lord Justice Jackson, who led the review, the new legislation is expected to have a significant impact on the insurance industry, both as providers of products and as litigants.

Caroline is an associate with Taylor Wessing, specialising in Disputes and Investigations, and will be bringing us up to date on how the changes are affecting insurance claims in practice.

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