

Simon Lawrence
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Profile

Simon Lawrence is a qualified actuary with approaching 25 years' post-qualification experience in the pensions industry. Simon has spent the bulk of his career working in consulting organisations in a variety of client-facing and managerial/leadership roles. Simon established Triangle Pensions Limited in April 2010.

In addition to strong technical and interpersonal skills, Simon has extensive experience of:

- client management for a variety of different client organisations,
- selling and delivering consulting services to Trustee and Corporate clients
- commercial and financial management, with responsibility for negotiating multi-million pound outsourcing contracts,
- project management,
- people management,
- operations management,
- merger and acquisition activity, and
- strategic business management.

Simon has acted in the capacity of trustee (of a defined contribution scheme with a defined benefit underpin) and as Pensions Manager (involving a variety of different schemes, on an interim basis).

He also possesses excellent written and verbal communication skills. He particularly enjoys working collaboratively as part of a team and is passionate about meeting and exceeding his internal and external clients' expectations.

Married with one daughter. Interests include family and friends, playing and watching football, playing squash, watching cricket, running, eating out, listening to music and watching good comedy. Having recently reached a milestone birthday, he is now actively ticking items off his "bucket list".



Work History

April 2010 to Present

Triangle Pensions – Owner

Triangle Pensions is an independent pension and benefits consulting firm formed by Simon Lawrence in April 2010. Recent projects include:

- Interim Pensions Manager for a French-owned bank
- Third-party evaluation projects to assess and review existing advisers
- Assessing feasibility of liability de-risking exercises (eg buy-out, Enhanced TVs)
- Development of marketing materials on behalf of specialist annuity provider
- Review of benefit options available following actuarial valuation
- Development of Auto-enrolment proposition targeted at SMEs.

November 2004 to March 2010

JLT Actuaries and Consultants Limited (“JACL”)

Divisional Director – Client Relationship Management (January 2009 to March 2010)

Responsibilities included:

- oversight responsibility for c.50 St Albans-based pension consulting and actuarial clients
- delivery of pension consulting services to Corporate clients
- oversight responsibility for group of non-St Albans-based Client Relationship Managers with pension consulting and actuarial clients
- liaison between Client Relationship Managers (representing demand for products and services) and JACL Practice and Proposition Heads (representing supply of products and services)
- development of Client Relationship Management capability across JACL
- people management responsibilities for a number of actuaries and consultants
- member of Working Party tasked with developing strategy for 2012 Pensions Reforms

Senior Consultant and Actuary (November 2004 to December 2008)

Responsibilities included:

- provision of technical actuarial and broad-based pension and employee benefits advice to a portfolio of Trustee and Corporate clients with responsibility for management, growth and profitability of clients
- project manager for delivery of effective communication materials to employees of HSBC Group (c. 50,000 employees) relating to new pensions tax regime – development of relationship from initial engagement of c.£20,000 to ultimate income of c. £500,000
- member of Project Steering Group for implementation of flexible benefits for HSBC Group with specific responsibility for project management of pension communication workstream – development of relationship from initial engagement of c.£5,000 to ultimate income of c.£3,000,000
- working with HSBC Bank Relationship Managers to extend and expand the range of services provided to their corporate banking clients
- people management responsibilities for a number of actuaries and consultants
- member of Working Party tasked with bringing new products and services to market

May 1988 to October 2004

Hewitt Associates

Senior Delivery Group Manager (June 2004 to October 2004)

Responsibilities included:

- overall operations responsibility (including quality and financials) for delivery of pension and flexible benefits administration services to portfolio of clients
- day to day client management responsibility for outsourcing relationships
- people management responsibility for team leaders.

Regional Finance Leader for Outsourcing (c. November 2000 to June 2004)

Responsibilities included:

- budgeting and forecasting
- pricing for new outsourcing service offerings and service extensions
- price and contract negotiations
- creating and maintaining financial infrastructure and tools to facilitate distributed model for client profitability
- member of UK outsourcing line of business leadership team.

Flexible Benefits Administration Practice Leader (November 1998 to c. November 2000)

Responsibilities included:

- delivery of leading-edge flexible benefits administration services to portfolio of clients
- integration of flexible benefits consulting and administration services
- client escalation point
- people management responsibilities for senior managers in flexible benefits administration practice
- member of UK outsourcing line of business leadership team.

Actuary and Pensions Consultant (May 1988 to November 1998)

Responsibilities included:

- provision of technical actuarial and broad-based pension and employee benefits (including flexible benefits) advice to a portfolio of clients with responsibility for management, growth and profitability of client relationships – note that one client relationship was expanded from an initial consulting project worth c.£10,000 to an annual income in excess of £1,000,000
- trustee of SCI (UK) Employee Benefits Plan (September 1992 to April 1997)
- people management responsibilities for a team of actuaries, pension consultants and administrators
- member of UK actuarial line of business leadership team
- specialised in pension and employee benefits aspects of mergers and acquisitions, negotiating on behalf of purchasers with a number of blue chip vendors.

May 1984 to May 1988

General Portfolio Life Insurance

Actuarial Student – responsibilities included managing the Investment Service Division, production of daily unit prices; provision of investment performance communications to direct salesforce.

September 1982 to May 1984

Provident Life Association

Actuarial Student – responsibilities included financial modelling of new life insurance products.

Education and Qualifications

July 1988

Qualified as Fellow of the Institute of Actuaries

September 1979 – May 1982

The City University – B. Sc. Honours Degree in Actuarial Science (2:1)

September 1972 – May 1979

Hasmonean Grammar School for Boys, London

1 S Level

4 A Levels

11 O Levels
