

## **Helen Frisby**

Director

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## **Background**

Helen joined ITS in 2007 and currently has day-to-day responsibility for the ITS Trustee Support Team and also sits on the ITS Management Committee. She is a highly motivated and excellent team player, with experience of providing trusteeship services to a variety of schemes with specific skills for schemes that are going through a restructuring exercise, are in the process of securing benefits with an insurer, or have entered a Pension Protection Fund ("PPF") assessment period.

## **Notable Client Achievements**

- Currently Lead Director on 3 sole trustee appointments and several PPF schemes and has overall responsibility for the management of the PPF contract held by ITS, delivering:
  - Defined Benefit buyouts
  - Project management of schemes going through a wind-up process
  - De-risking exercises
  - Input into investment strategy reviews
  - Input into employer negotiations for triennial valuations
  - Conduct of benefit and data audits
  - Implementation of benefit rectification exercises
  - Managing client expectations via regular portfolio reviews
- Worked for 7 years with a leading benefits consultancy specialising in scheme discontinuance with overall responsibility for a team of 15, delivering:
  - Production of project plans for schemes in wind-up from start to finish
  - Completion of DC, DB and DB with GMP underpin scheme wind-ups
  - Producing member bulletins providing updates on progress of wind-up
  - Managing client expectations via regular progress reports
  - Co-ordinating professional advisers to an agreed project plan

## **Professional Qualifications/Awards**

The PMI Award in Pension Trusteeship and a Fellow of the Pensions Management Institute (FPMI).

## **Areas of Expertise**

- ✓ Risk transfer (buy in/buy out)
- ✓ Ongoing support to DB/Hybrid schemes – either in context of Chair or Board member
- ✓ Sole Trusteeship
- ✓ Difficult Valuation Exercises
- ✓ Schemes in PPF assessment
- ✓ Scheme Wind up DB and/or DC/or in surplus
- ✓ Insolvency
- ✓ Scheme/sponsor under TPR investigation
- ✓ Working with a Challenging Covenant review
- ✓ Provider review
- ✓ Master Trust ongoing DC/DB
- ✓ DC Trust to DC Master Trust transfer
- ✓ Complex benefit rectification exercises
- ✓ Managing benefit and data audit exercises