

## **Susan Barber** Senior Trust Officer

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### **Background**

Sue joined ITS in 2010 and works alongside our professional trustees on a portfolio of on-going schemes, undertaking a range of scheme management activities. Her role is focused on ensuring that best practice and a high standard of good governance is delivered. Prior to ITS, she worked for two years with the Pension Protection Fund, as a relationship manager for a large third-party administrator and with Mercer in their consultancy discipline. She has also worked closely with the in-house pension management teams at BT and Atos Origin supporting discrete pension scheme restructuring exercises.

### **Notable Client Achievements**

- Directly involved with three appointments in the SME sector, a charity, a high-profile media corporation, an IT solutions provider, a coffee & vending supplier and the Northern Irish sister scheme of a drinks distribution company. As a 'scheme manager' she oversees the day-to-day business on these schemes interacting routinely with both the associated advisor appointments and the Sponsor.
- Completed a 5-year term as a member nominated trustee on the JLT Pension Scheme (a hybrid scheme with assets of over £600m). On the JLT Pension Scheme Sue was also a member on the administration sub-committee, with responsibility for governance, risk management, member communication and advisor appointments, and both the DB and DC investment subcommittees.
- An on-going member of the Admin & Governance Sub Committee for one of the Unisys UK pension schemes to which ITS Ltd is a trustee director.
- Experienced in running procurement exercises across various disciplines (for example, the appointment of an 'at retirement' financial advisory service for a large award winning pension scheme, the provision of consolidated administration, actuarial and investment service and the transition of administration services from one TPA to another).
- Overseen the completion of a £60m buy out exercise and ran two MNT election exercises for a unionised utilities provider.
- Completed a 2,000-member rectification exercise following a review of the application of RPI or CPI.

### **Professional Qualifications/Awards**

Member of the Pensions Management Institute (PMI) and holds the PMI Award in Pension Trusteeship and DC Governance.

### **Areas of Expertise**

- ✓ Risk transfer (buy in/buy out)
- ✓ Ongoing support to DB/Hybrid schemes – either in context of Chair or Board member
- ✓ Ongoing support to DC
- ✓ Sole Trusteeship
- ✓ Scheme Closures
- ✓ Scheme Wind up DB and/or DC/or in surplus
- ✓ Working with a Challenging Covenant review
- ✓ Provider review