Punter Southall Governance Services

1995

Business incorporated as Hymans Robertson Trustees Ltd

Pensions Act 1995 Result of the Maxwell scandal & Goode Committee report

Barings Bank collapses

Wayne: 5 years as professional trustee

96

Take That split up

British Rail privatisation begins

97

PA95 implemented

GMPs replaced, MFR introduced

Tony Blair becomes Prime Minister

First Harry Potter novel released

Ann: 25 years in pensions

98

£2

First general circulation of £2 coin

Bond yields continue to fall to around 4%

Construction of Millennium Dome begins

99

€

Euro launched

Kathy: 15 years in pensions

Ross Kemp leaves EastEnders

2000

Y2K ARRIVES

Nothing nasty happened

Punter Southall Group acquires business

Name changes to PS Independent Trustees Limited

Headed up by Andy Scott in Edinburgh office

Legislation announces replacement of SERPs with S2P in 2002

01

Ian starts term as PMI President

Stakeholder pensions introduced

First episode of The Office

02

S2P introduced

Queen's Golden Jubilee

British ex-pat loses legal challenge to have state pension increased in line with inflation

03

Concorde's final commercial flight

Pension Credit introduced

Our turnover: £166,588

04

Simplification 'agenda' leads to Pensions Act 2004 & Finance Act 2004

The Gherkin opens

Boscastle floods

2005

Wayne Phelan appointed as Managing Director

Kirsty: 15 years in pensions

Strategic review changes focus to ongoing schemes

Management of business moved to Wokingham office

70%

Internet access in UK reaches 70%

06

6 April A-Day

Julie Karavis & Ann Geer transfer from Punter Southall

007

Daniel Craig debuts as James Bond

07

Bank of England unexpectedly raises interest rates to 5.25%

Mike: 20 years in pensions

Final edition of GRAND STAND

08

Lisa Turner joins

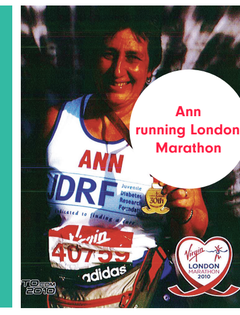
Global stock markets crash – financial world implodes

Boris Johnson becomes London mayor

09

Ian Eggleden & Mark Homer join

Bank of England cuts base rate to 0.5%



2010

Mike Ironside & Tina James join

State Pension age for women starts to increase

Inflation measure for pensions switched to CPI

One millionth Range Rover produced

Icelandic volcano causes ash cloud over UK

11

Kirsty Furze joins

Client satisfaction rating: 4.4 out of 5

Finance Act and Pensions Act introduce major changes to pensions tax relief, automatic enrolment, state pension age, money purchase benefits...

Royal wedding

Final Harry Potter film released in UK

12

Curtis Mitchell joins

PSIT team starts charitable work to give something back to the community

London Olympics & Paralympics

Automatic enrolment starts

13

Kathy Trusler joins

Andy Murray wins Wimbledon

1 1 3

Age at which last living British person born in the 1800s dies

14

Team additions to meet continuing growth – Gillian, James & Simon

Client satisfaction rating: 4.7 out of 5

AAF accreditation achieved

Scots vote to stay in the UK

WE ARE MACMILLAN. CANCER SUPPORT

Team raise nearly £5,500 for Macmillan

2015

Annuity

Drawdown

Cash lump sum

Pensions flexibility brings freedom of choice for those age 55 or over with DC funds

Lorna Griffin-Smith, Kevin Clark & Suzi Lowther join

Workplace pensions governance rules introduced for pension providers

Ethel Lang, last person to be born in the reign of Queen Victoria, dies age 114

16

Clare Owen joins & James Duggan transfer from Punter Southall

BREXIT

UK votes to leave the EU

Wayne Phelan named Independent Trustee of the Year & Ann Geer named Trustee Secretary of the Year

PSIT in top 5% of JustGiving fundraisers

WINNER 2016 Ei TRUSTEE AWARDS

21st century trusteeship discussion paper issued

17

Jasmin Clark joins

Donald Trump sworn in as US President

QUIZ night raises over £6,300 for Daisy's Dream

Neymar transfers for world record fee €222

18

merger with hrtrustees

Sophie Moyo, Natalie Adeoba, Fiona Smith & Cat Gibson join

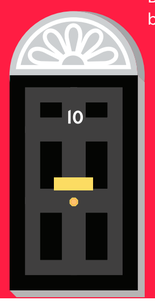
Heatwave!

Stuart Southall becomes Chairman

19

Minimum auto enrolment contributions rise to 8%

Client satisfaction rating: 4.8 out of 5



Boris Johnson becomes PM

Anne-Marie Monahan, Felicity Letcher, Sarah Booth & Thani Spacey join

20

PSGS re-appointed to Pension Protection Fund Trustee & Support Services Panel

COVID-19 pandemic stockpiling toilet paper, PPE, clapping for the NHS, remote working & national lockdowns

NHS

Tom Corten, Kate Barette, Simon Lewis & Emma Anderson join

Turnover: £7.8m

2021

Louise Webb, Ken Potter & Mike Parker join

APTITUDE ACCREDITED PROFESSIONAL TRUSTEE

PSGS has 20 PMI accredited professional trustees

Size of team: 46

Schemes we act for: 236