

Kate Barette

Assistant Scheme Manager



Kate is a member of our specialist Pension Protection Fund (PPF) team.

Email: kate.barette@psgovernance.com

Tel: 0118 207 2934 • Office: Reading

Background & experience

Kate started her financial services career in 2000 working for providers and financial advisers. Her previous role as a paraplanner for a national financial adviser firm concentrated on writing suitability reports covering pensions, investments and protection.

Kate joined us in 2020. She supports the scheme managers by processing invoices, attending meetings and writing minutes. She liaises with scheme administrators, legal advisers and auditors, giving her a well-rounded understanding.

Every day Kate is learning more about PPF assessment, how different pension schemes are run and appreciates the importance of keeping reliable scheme documentation to show what has or hasn't been agreed.

Kate has travelled to Cambodia and New Zealand with her children to show them the world in person rather than just online!

Qualifications: CII Financial Planning (R01, R02 & R04), BSc Geography

Specialisms

buy-outs & wind up • financial planning
adviser liaison • minute taking

Example projects

PPF+ buy-out Supporting a buy-out project involving three PPF+ schemes all with different requirements. Kate's knowledge has enabled her to provide more support to members and help towards a smooth transition.

VAT reclaim Collating and presenting data to VAT specialists and the HMRC to potentially benefit the schemes involved.

Client management system Implementing a new system, focusing on the build of suitability reports. Kate coordinated project managers and programmers to ensure specific requirements were compliant, changes managed and deadlines met.

Example clients

	Assets	Members
Client A (DB & DC)	£173m	1,941
Client B (DB & DC)	£54m	844
Client C (DB)	£23m	240