

James Duggan Scheme Manager



James co-ordinates all day-to-day activities for a range of scheme secretarial and independent trustee appointments.

Email: james.duggan@psgovernance.com

Tel: 0118 207 2913 • Office: Reading

Background & experience

After a successful actuarial internship at Punter Southall Limited, James joined their actuarial consultancy team in 2010. He joined us in 2016.

James has particular experience in scheme funding, actuarial factor reviews and setting transfer value bases. He is involved in member communications, providing pension scheme investment advice and delivering trustee secretary services to clients.

In 2011, James was seconded to the Pension Protection Fund (PPF) where he was involved in completing the yearly actuarial valuation for the organisation. He is also experienced in Financial Assistance Scheme (FAS) cases.

James likes to keep active - he was Players' Player of the Season for his football team and has achieved the Sports Diver Scuba Diving qualification. If that isn't enough, he has climbed Mount Snowdon and is on track to visit all seven continents (two to go!).

Qualifications: Institute and Faculty of Actuaries examinations, BSc Hons Mathematics with Actuarial Science, accredited professional trustee



Specialisms

actuarial issues • member communications
ongoing schemes • PPF & FAS
pension consultancy

Example projects

Investment transition Organising the transition of a new investment strategy, ensuring documents were completed by relevant parties and reached the correct end point.

.....

Improving communications Helping to redesign a pension scheme newsletter to make it shorter, more informative and, most importantly, more engaging for members.

.....

DC Code of Practice Developing an assessment tool to help clients analyse how their scheme stacked up against the Pensions Regulator's Code of Practice, which neatly summarised recommendations and actions.

.....

Example clients

	Assets	Members
Client A (DB)	£76m	1,500
Client B (hybrid)	£330m	3,700
Client C (hybrid)	£1.4bn	11,400