



Punter Southall
GROUP

Fear and the future: aboard the modern-day Matthew

Jonathan Punter

Co-founder and Chief Executive Officer,
Punter Southall Group



My Cabot Connection



Connecting Canada and the UK



Referendum on UK in the EU



WHY?



Expert witnesses needed for...

**Professional
Negligence**

**Pension
Construction**

**Statutory
Inheritance
claims**

**Quantum
on pension
rights loss**

*“The actuarial advice provided to the trustees by **Scottish Widows** was supported by an expert witness, **Jonathan Punter** of Punter Southall. **Lord Hodge** could not find any fault in **Mr Punter’s** assessment that the actuarial advice was within acceptable actuarial practice and noted **Mr Punter** as giving a convincing defence of the actuarial advice given to the trustees.”*

Scottish Widows news release, 2009

Key areas of analysis

Liability

Who was to blame?

Causation

How did it happen?





Quantum

What was the loss worth?

Initial assessment of merits of the case

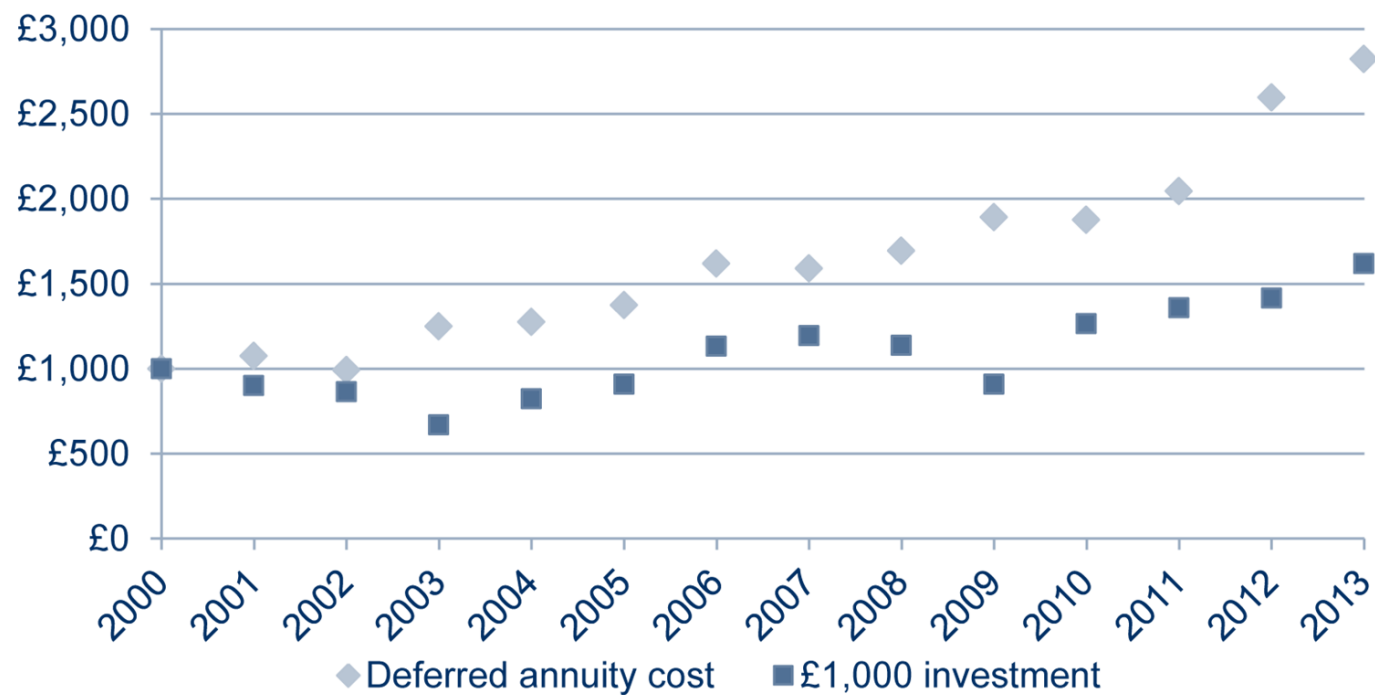
- ➔ **Subject to privilege**
- ➔ **Preparing report with lawyers**
- ➔ **Refining merits of the case**
- ➔ **FOCUS**
- ➔ **Giving evidence**
- ➔ **Cross-examination**

How: the expert witness process

-  **Supported by colleagues**
-  **Thorough understanding of issues**
-  **Professional knowledge**
-  **Legal knowledge**

“I understand that my duty in providing written reports and giving evidence is to help the Court and that this duty overrides any obligation to the party by whom I am engaged or by the person who has paid or is liable to pay me.”







Questions

Punter Southall Group has offices across the UK.
For further information, visit our website at www.puntersouthallgroup.com

Awards, Affiliations and Sponsorships

ASINTA[®]
GUIDING YOU TO A WORLD OF BENEFITS

winmark
PensionChair
P A R T N E R

amit Association of Member
Nominated Trustees

 **Association
of Chairs**
Supporting charity and non-profit chairs

Pensions
2015
Winner
**Auto-enrolment
consultant**
Punter Southall

WINNER
**BEST ADVISER
AUTO-ENROLMENT
PROPOSITION**
adviser
AWARDS '15

CFG *Supporter of*
INSPIRING
FINANCIAL
LEADERSHIP

© Punter Southall Group 2016. Punter Southall Group is a trading name of Punter Southall Group Limited. Registered in England and Wales No. 4096788. Registered office: 11 Strand, London WC2N 5HR.

Punter Southall Investment Consulting is a trading name of Punter Southall Investment Consulting Limited. Registered in England and Wales No. 6242672. Registered office: 11 Strand, London WC2N 5HR. Punter Southall Investment Consulting is authorised and regulated by the Financial Conduct Authority (FCA) with FCA reference number 528774.

Punter Southall is a trading name of Punter Southall Limited. Registered in England and Wales No. 03842603.

Punter Southall Aspire is a trading name of Punter Southall Defined Contribution Consulting Limited. Punter Southall Defined Contribution Consulting Limited is authorised and regulated by the Financial Conduct Authority (FCA) with FCA reference number 121328.

PSAL and PS Administration are both trading names of PS Administration Limited. Registered in England and Wales No. 9428346.

Punter Southall Health and Protection Limited is authorised and regulated by the Financial Conduct Authority, Firm reference number 312841. Registered in England and Wales No. 1393888.

This communication should not be relied upon for detailed advice or taken as an authoritative statement of the law.