

## 1995

Business incorporated as Hymans Robertson Trustees Ltd

**Wayne:** 5 years as professional trustee

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

Barings Bank collapses



## 96

Take That split up

British Rail privatisation begins



## 97

PA95 implemented

GMPs replaced, MFR introduced

Tony Blair becomes Prime Minister

**Ann:** 25 years in pensions

First Harry Potter novel released



## 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





The team on the Thames



Curtis on target

## 2000

Nothing nasty happened

Y2K ARRIVES

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

Queen's Golden Jubilee

S2P introduced

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

Bosccastle floods



## 2005

**Wayne:** 15 years in pensions

Strategic review changes focus to ongoing schemes

Management of business moved to Wokingham office



## 06

Wayne Phelan appointed as Managing Director

Internet access in UK reaches 70%



## 06

Julie Karavis & Ann Geer transfer from Punter Southall

6 April A-Day

Daniel Craig debuts as James Bond




## 07

Bank of England unexpectedly raises interest rates to 5.25%

Final edition of GRANDSTAND

Mike: 20 years in pensions



## 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%



## Ann

Ann running London Marathon





Lisa makes a new friend

## 2010

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

**Kirsty:** 20 years in pensions

**Julie:** 25 years in pensions

**Kathy:** 26 years in pensions



## 11

Kirsty Furze joins

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

Royal wedding

Client satisfaction rating: 4.4 out of 5

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

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

Team raise nearly £5,500 for Macmillan




## 2015

Lorna Griffin-Smith, Kevin Clark & Suzi Lowther join

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

Workplace pensions governance rules introduced for pension providers

Annuity

Drawdown

Cash lump sum

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




## 16

Clare Owen joins & James Duggan transfer from Punter Southall

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

UK votes to leave the EU

PSIT in top 5% of JustGiving fundraisers

2016 TRUSTEE AWARDS WINNER

21st century trusteeship discussion paper issued








The James D double act hard at work

## 17

Jasmin Clark joins

Donald Trump sworn in as US President

Quiz night raises over £6,500 for Daisy's Dream

Neymar transfers for world record fee

€222




## 18

merger with hrtrustees

Sophie Moyo & Cat Gibson join

Heatwave!

Stuart Southall becomes Chairman





## 19

Minimum auto enrolment contributions rise to 8%

Boris Johnson becomes PM

Client satisfaction rating: 4.8 out of 5

Anne-Marie Monahan, Sarah Booth & Thani Spacey join

10






The team at the PSGS virtual summer fete

## 2020

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

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







## 21

Louise Webb, Kat Gruenewald, Tracey Brown, Jamie Goodfellow, Jason Beach, Ken Potter, Sabrena Edmonds & Chloe Key join

PSGS has 20 PMI accredited professional trustees




## 22

Queen's Platinum Jubilee

Simon Brandt, Clare Adams, Julia Williams, David Griffiths, Sasha Jain, Sophia Harrison & Mindaugas Pranaitis join

Turnover: £8.3m

PSGS team: 56

Schemes we act for: 243

