



## HISTORY OF THE LAWYERS ASSOCIATION

The PLA was the brainchild of Kobus Hanekom who in 1995 attended an International Pension and Employee Benefit Lawyers Association (IPEBLA) conference in Vancouver. Inspired by such a conference for pension lawyers, Kobus came back to South Africa and established the PLA as a non-profit entity. The PLA's first conference was held at the Lord Charles Hotel in Somerset West which, without any sponsors, made a modest profit.

From the outset the PLA was a non-profit entity whose objectives were primarily to educate people about issues of pensions law and to stimulate legal debate. To that end it held annual conferences, which generally rotated between Cape Town and Johannesburg, with one conference being at Pilanesberg.

The annual conferences which took place over 2 days, focused primarily on legal and pensions law issues, and were always successful and highly regarded. Amongst the notable presenters were Advocate M Wallis, SC (now Judge of the Supreme Court of Appeal); Professor Hayton, of King's College, London University; Philip Bennett and Jonathan Seres, both past chairpersons of IPEBLA; Professor N Barr of the London School of Economics and Joanne Segars, Chief Executive of the NAPF (now the Pensions and Lifetime Savings Association of the UK).

The conferences had some fun moments such as appearances by Pieter Dirk Uys, a panel discussion with Judge Dennis Davis and moot courts on topical issues. In addition, there were the social events which were important to maintain the collegiality which has been a hallmark of the PLA conferences. For the most part, and certainly in recent years, the PLA avoided any sponsorship to ensure that the independence of the presentations could not be doubted.

The annual conferences were supplemented by seminars and more recently webinars as well. John Murphy, the first Pension Funds Adjudicator who when in office played a very important role in shaping the jurisprudence around pensions law, was most helpful in contributing to these.

The PLA from its inception has always been a partner with IPEBLA, and PLA members have played a valuable role in IPEBLA both on its steering committee (Kobus Hanekom, Leanne van Wyk, Fiona Rollason, Vanessa Bell, Jonathan Mort and Karen Quinlan amongst others) and as editor of the IPEBLA journal (Leanne van Wyk and Jonathan Mort). Jonathan Mort has played a significant role in the publication: A Comparative Survey of Pension Law Issues. The PLA typically sponsors members to attend the IPEBLA conference where the contributions by PLA members were always highly regarded.

The Presidents of the PLA have included Kobus Hanekom, Steven Wright, Desiree Partridge (Meyer), Pierre Reineck, Leanne van Wyk, Jonathan Mort, Graham Damant, Gerhardt Meyer, Tashia Jithoo, Brenda Penny, Hunter Thyne, Michelle David, Vanessa Bell, Paul Williams, Karen Quinlan, Chantal Manson and Nondumiso Ntshangase.

# HONORARY / LIFE MEMBERS

The Constitution allows the Committee to bestow Honorary or Life Membership on any person who in the opinion of the Committee has made any worthy, ongoing and / or significant contribution to the Association.

The following members have received Life Membership for the significant contribution that they have made to the Association:

- Stephen Wright
- Desiree Meyer (nee Partridge)
- Kobus Hanekom
- Jonathan Mort
- Andrew Mestern

**The following is a summary of the conferences held since 2002.**

Year	Venue	Theme / Key Topics
2002	Protea Hotel President, Bantry Bay, Cape Town	Professor John Murphy, Pension Funds Adjudicator, focussed on a pension law update. The relationship between the employment contract and the retirement fund was unpacked. Discussion took place on a proposed new basis for the distribution of death benefits with an international perspective.
2003	Caesar's Palace, Johannesburg	The theme of <i>Putting the Puzzle Together - The Past, the Present &amp; the Future</i> focussed on topics relating to the surplus legislation and the regulations around minimum benefits.
2004	Cape Town International Convention Centre	The keynote address relating to "The Extent of the Fiduciary Obligation of the Trustee" was delivered by Professor David Hayton, Professor of Law – Kings College, London University and this set the stage for the theme of <i>Changing Tomorrow – sharing knowledge and experience, preparing for the future.</i>
2005	Birchwood Hotel & Conference Centre, Johannesburg	Elias Masilela – National Treasury Chief Director for Macroeconomic Policy discussed "The Way Forward" with other speakers looking at the many ways of <i>Adapting to Change</i> , which was the theme for this conference.
2006	Spier, Stellenbosch, Cape Town	The conference topics focussed on the theme of <i>Our Industry is changing, are we?</i> Discussions took place around the rights and obligations in an evolving retirement funds environment.
2007	Sun City, Pilanesberg	Appropriately themed <i>Make a Splash</i> , the topics covered a roundup of 2006 and looked at the many proposed legislative changes.

2008

NH The Lord Charles Hotel,  
Somerset West, Cape Town

The keynote address was delivered by Adv. John Myburgh SC on "Constitutional Issues impacting on Pensions Law". Various sessions focussed on pension law developments in Africa and beyond as well as many anticipated local developments in-line with the theme of *Revolution for Retirement Funds*.

2009

Montecasino, Johannesburg

The Hon. Retired Judge R. Zulman delivered the keynote address which set the stage for the *Midnight in the Garden of Good and Evil* themed conference. Topics discussed related to alternative dispute resolution of pension law disputes and the experience of the Adjudicator's mediation process. Observations from the UK relating to the pension lawyers' universe provided an international perspective to the conference.

2010

Spier, Stellenbosch,  
Cape Town

Justice Kate O'Regan, as the keynote speaker addressed "Constitutional Goals for 2010 and Beyond". The topics that followed related to early fraud detection, governance agreements, with suggestions to improve the pension landscape.

2011

Park Hyatt, Rosebank,  
Johannesburg

With the focus on *A Paradigm Shift in Stakeholder Protection*, various speakers addressed the principles of Treating Customers and Pension Stakeholders Fairly, and the Protection of Data with the Deputy Ombud of the Long-Term Insurance Ombuds Office giving their perspective.

2012

Pavilion Conference  
Centre, V&A  
Waterfront, Cape Town

The keynote speaker on day 1, Jonathan Seres – Chair of IPEBLA discussed the plight of trustees in fund governance whilst other speakers discussed various aspects of proposed pension reform in-line with the theme of *Between the Tides*. On day 2, the keynote speaker, Prof. Nicholas Barr, Professor of Public Economics, London School of Economics, discussed "Designing pension systems for the 21st century".

2013

Misty Hills Country Hotel,  
Johannesburg

The keynote address on Retirement Reform in South Africa was delivered by David McCarthy – National Treasury with the various plenary and breakaway sessions dealing with the impact of the tax reforms and annuitisation and compulsory preservation proposals.

2014

Cape Town International  
Convention Centre

This conference was themed *When I'm 64* and Joanne Segars – Chief Executive, National Association of Pension Funds (NAPF -UK) presented a perspective on the greatest social, political and economic pressures faced to provide citizens with a decent income in old age in the face of rapidly ageing populations and pressures on government finances. Further discussions related to topical pension law matters.

2015

Sandton Convention Centre

Themed, *My Pension*, the speakers considered topics such as Pension Power, Trustee Fit & Proper Requirements, the latest on Retirement Reform and the practical approach to fiduciary responsibilities in exercising oversight of pension fund investments.

2016	Cape Town International Convention Centre	This being the 21st conference of the PLA, the focus was on the Pensions Law State of the Nation and the developments in pensions law and regulations, specifically over the past year.
2017	Cape Town International Convention Centre	The "State of the Nation" address dealt with the annual stock-take of the industry, looking back over key legal developments of the past year as well as what could be expected in the future. Topical issues were the Financial Sector Regulatory Bill, the Retail Distribution Review and National Treasury's next moves.
2018	Cape Town International Convention Centre	Adv. Jeremy Gauntlet SC delivered a keynote address on "Corruption and a Captured State". This was followed by regulatory updates with a focus on the Financial Sector Regulation Act and POPIA.
2019	Hilton Hotel, Sandton, Johannesburg	Adv. Chris Loxton SC opened the conference by exploring the "State of Litigation and Pension Funds." An update was provided in respect of the Default Regulations and the topic relating to what we could expect from the Conduct of Financial Institutions Bill (COFI) was discussed.
2020	No conference due to Covid-19 Pandemic	The PLA and IPEBLA had worked together to present a joint conference, the first of its kind in South Africa. Unfortunately, due to stringent lockdown measures as a result of the Covid pandemic, the conference had to be cancelled.
2021	Virtual	This was the PLA's 25th annual conference and their first virtual conference, necessitated by ongoing lockdown measures. Attendees included IPEBLA members who would not otherwise have been able to attend in person. The conference consisted of a full agenda with Ismail Momoniet – Head Tax & Financial Sector Policy, National Treasury giving the opening plenary address: "An update on retirement reform from National Treasury."
2022	Virtual	With lockdown measures still in place, a successful 2nd virtual conference was held. Andrew Godwin – Melbourne Law School, and Andrew Schmulow – University of Wollongong, Australia, the conference keynote speakers discussed the "Twin Peaks regulatory architecture in Australia and abroad."
2023	Cape Town International Convention Centre	This was the first in-person conference since prior to the Covid-19 pandemic. The conference was held jointly with IPEBLA (as had been the intention in 2020). The keynote address was delivered by the Hon. R Lamola, Minister of Justice & Correctional Services who provided an encouraging update on the retirement landscape in South Africa. Various discussions were jointly presented by South African speakers together with our IPEBLA colleagues, which provided an interesting international perspective.