



PENSION PARTNERS

Curriculum Vitae

Kate Ive

Founding Partner

Kate's 25 year career as a specialist pensions lawyer has incorporated many senior roles, including partnership, for top UK law firms DLA, Hammonds, Osborne Clarke and Wragge & Co. Known for providing clear and pragmatic advice to support commercial objectives, Kate's established her own firm, Pension Partners LLP, with another pension specialist Pauling Anning.

Experience

General Pensions Advice

- Advice to pension scheme trustees and companies on topical issues such as changes in legislation, the impact of cases, governance including monitoring the employer covenant and security, equalisation issues, pension sharing on divorce, complaints to the Pensions Ombudsman. Kate advised the trustees of the Galiform Pension Plan regarding security when the sponsoring company entered into secured borrowing arrangements. This involved ensuring that the trustees' security was protected vis-a-vis that of the banks.

Corporate Transactions

- Advice to trustees or companies on the sale and purchase of companies or businesses.
- Advice in respect of the Transfer of Undertakings (Employment Protection) Regulations 1981 ("TUPE"), and in particular the effect of the Beckmann case.
- Advising public and private sector clients and negotiating on the pensions aspects of PFI and outsourcing, including admitted body status and GAD passports.
- Conducting pensions due diligence on behalf of corporate investors.

Dealings with the Pensions Regulator

- Advice to trustees or companies regarding clearance applications; discussions with The Pensions Regulator.



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Dealings with the Pension Protection Fund

- As independent trustee, taking a scheme through the process of entry into the PPF.
- Advising companies and trustees where there is a possibility of entry into the PPF.
- Advising companies and trustees and discussions with the PPF in relation to corporate restructuring associated with entry into the PPF.

Investment

- Advising trustees on the legal aspects of investment.

Scheme Mergers

- Advising trustees and companies regarding merger of pension schemes.

Scheme Restructuring

- Advising trustees and companies regarding scheme discontinuance, closure, discontinuance of final salary arrangements and replacement with career average of defined contribution arrangements.
- Sectionalisation.
- Withdrawal and apportionment arrangements.

Drafting Documentation

- Such as definitive deeds, merger deeds, escrow agreements.

Independent Trusteeships

- Of both discontinuing and ongoing schemes.

Applications to Court

- Such as rectification.



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Career

2009 - formed Pension Partners LLP with Pauline Anning
2004 - 2009 Consultant for Hammonds (now Squires Sanders) Birmingham
2001 - 2003 Wragge & Co Birmingham
1999 - 2001 Partner, Osborne Clarke Bristol
1997 - 1999 Partner, DWF Liverpool & Manchester
1987 - 1997 Solicitor and partner, DLA Liverpool & Manchester
1985 - 1987 Aaron & Partners Chester
1983 - 1985 Hagues Knutsford

Qualifications

BSc Management Sciences University of Manchester
Common Professional Examination - Manchester Metropolitan University
Law Society Finals - Manchester Metropolitan University
Admitted as a solicitor in December 1985

Kate is a member of the Association of Pension Lawyers and a committee member of West Midlands National Association of Pension Funds