

# Expert witness services

Hymans Robertson's expertise and long-standing experience covers independent pensions, investments, benefits and risk consulting services, to employers, trustees and other institutions.

We have an experienced team with many years of experience in providing expert witness advice and acting as expert witnesses in relation to disputes on behalf of trustees, companies, representative individuals and regulatory bodies.

## Our experience

- ▶ Preparing reports for court and the Pensions Regulator's determination panel
- ▶ Preparing documents for and attending mediations
- ▶ Experience of cross examination
- ▶ Arbitration proceedings
- ▶ Quantum issues (such as administration errors and Barber equalisation issues)
- ▶ Losses in relation to the PPF
- ▶ Actuarial issues in relation to breach of good faith claims
- ▶ Scheme benefit changes
- ▶ Investment strategy decisions
- ▶ Assessing funding guarantees
- ▶ Scheme closure and amendment of benefits
- ▶ Benchmarking funding and investment strategies
- ▶ Actuarial disciplinary tribunals where a deal was more likely.

## What our clients say

“The clients were pleased with the outcome and your work on quantum provided a key framework for the discussions...your work was a great help.”

“Thanks again to you and your team for all the excellent work you have done, and for all the professionalism, patience and industriousness you have all shown.”

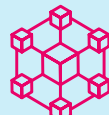
## Why work with us?



Our steadfast **independence** allows us to put clients at the heart of our business



Our expert witness team has many years of **experience** across a wide range of cases



We work **collaboratively** with you to provide a thorough forensic approach to the case



We produce **robust**, accurate and consistent advice to support the case



We produce **clear** expert reports without unnecessary technical jargon

## Our experts



**Martin Potter**

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0131 656 5102

Martin is a Scheme Actuary with 30 years' experience and has been a Partner of Hymans Robertson since 2006. His clients include some of the Firm's largest and most complex pension scheme clients. Advice for his clients involves scheme funding, risk management, benefit changes, scheme closures, corporate restructuring, risk transfer transactions (buy-ins and longevity swaps) and all aspects of advice commonly undertaken by Scheme Actuaries. In such work he acts as the lead partner with primary responsibility for the advice given.

Martin has acted as an expert witness on a number of occasions, covering a range of cases. He has also provided senior peer review to one of his Partners acting as an expert witness. The cases he has been involved in have covered quantum of loss suffered as a result of ineffective attempts to equalise or amend pension benefits; advising on section 75 debt calculations; and the impact of a Pensions Regulator sanctioned compromise to reduce liabilities.



**Chris Hurry**

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0131 656 5105

Chris qualified as an Actuary in 1992, joined Hymans Robertson in 2006 and is a Partner of the firm. Chris has provided scheme actuarial and consulting advice to a range of UK pension funds, both in terms of size and industry. Chris is one of the Firm's most experienced scheme actuaries and advises a wide range of clients from both trustee and corporate perspectives, spanning scheme funding, risk management, liability management and risk transfer (insurance) exercises. Chris has been involved in a significant number of corporate transactions, spanning due diligence, and covenant-affecting activity (such as the sale of elements of a business, acquisition by an overseas entity and financial restructuring).

Chris has acted as an expert witness in pension disputes, including cases relating to disputed scheme benefit changes and administration errors. He has also acted alongside other experts in an independent expert capacity to advise the Pensions Regulator on a confidential case, requiring independent evaluation of obligations under different scenarios.