

Carol Perry

Director



Carol was appointed as a Director of Independent Trustee Services Limited in July 2006, bringing diverse industry experience to the role.

Carol has worked in the pensions industry for over thirty years, starting her career as a student actuary with Legal and General, moving through consultancy with Mercer, a pensions management role with a large multinational group and as Pensions Director of Duncan Lawrie Pension Consultants Ltd and Moorgate House plc, before moving to the House of Commons as Head of Pensions. Carol is a Fellow of the Pensions Management Institute, and a former tPAS adviser.

Carol's experience includes...

- Acting as lead or peer Director for ITS on a number of its ongoing appointments for schemes with assets ranging from £10m up to £500m. Her appointments cover the full spectrum of DB, DC, CARE and hybrid schemes.
- Chairing the Trustee Board for a number of appointments including Investment sub-committees.
- Extensive experience in recognising and balancing competing interests particularly between member and company nominated Trustees and where member nominated Trustees have electorates with conflicting issues.
- Leading or assisting co-trustees through funding and covenant discussions.
- Acting as lead Director for ITS on cases involving the restructure of the sponsoring employer or group, representing the interests of the pension creditor, including negotiations on Clearance where sought.
- Leading or assisting co-trustees with good governance and risk management for the scheme as well a managing trustee training through a coaching and mentoring process.
- Serving the PMI's education service as tutor, author and examiner. She has also co-authored a PMI text book on investment.

