

THE WINNERS

THURSDAY 27th JUNE 2024
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WELCOME
FROM THE EDITOR

Welcome to the book of the night for what was yet another memorable Corporate Adviser Awards ceremony at our new venue, Hilton Bankside.

In what has been an incredibly positive year for the benefits sector across virtually all product and service channels it was an absolute pleasure to see so many people from all corners of our industry coming together to celebrate the very best our sector has to offer.

We had a record number of entries across both the adviser and provider categories, making the judges' job harder than ever this year. As always, it is inevitable that great organisations and propositions went home without awards – this is testament to the high standards that have been set in our sector, and better luck next year.

But the winners, celebrated in this Awards night supplement, can reflect on the fact that they have truly stood out against their very expert peers. The judging process is lengthy and detailed, with a high level of scrutiny of entrants by a wide range of genuine experts. So if you are one of this year's winners, you really have excelled - congratulations.

Thank you to everyone who put in such powerful, well thought-through entries, and to the judges who gave so much of their time to consider them in such detail. The judging sessions were fascinating, giving real insights into what industry stakeholders think matters. And thanks also to our sponsors without whom the evening would not have been possible. Congratulations to all our winners – and I hope to see you all at next year's Awards.

John Greenwood, Editor

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MEET THE JUDGES

CORPORATE ADVISER PANEL



Andrew Barradell,
Head of Workplace Savings,
Benefex



Sarah Brannan,
Senior Consultant,
Buck



David Croker,
Head of Workplace Savings,
MMB Corporate,
Mercer Marsh Benefits



Anne Drugnick,
Principal –
Health & Protection,
Secondsight



Charlotte Gibson,
Director,
Advisory Services,
Willis Towers Watson



Tim Gillingham,
Founder and Director,
Benefiz



Charlie Goodman,
Partner,
Employee Benefits
Collective LLP



Kevin Grant,
Risk & Healthcare
Senior Consultant,
Isio



Matthew Gregson,
Executive Director,
Howden Employee
Benefits & Wellbeing



Tristram Hawthorn,
Partner,
Employee Benefits
Collective LLP



Shabna Islam,
Head of DC Provider
Relations,
Hymans Robertson



Simon Jackson,
Principal,
Lane Clark &
Peacock LLP



William Johnson,
Managing Director,
The Ink Group



Claire Keenan,
Group Risk Consultant,
Buck



Suzanne McGowan,
Director,
LIFT-WorkWise



Sean McSweeney,
Employee Benefits
Team Director,
Mattioli Woods



David O'Reilly,
Head of Consulting,
NFP



Mark Pugh,
Head of
Employee Benefits,
Verlingue



Jeff Scripps,
Director,
Generation
Employee Benefits



Jeanette Smith,
Senior Pension
Consultant,
Capita Pension Solutions



Andrew Waller,
Director,
Generation
Employee Benefits



Edward Watling,
Head of Health
Wellbeing Benefits,
Mattioli Woods



John Yates,
Principal & DC
Proposition Leader,
Buck



Gavin Zaprala-Banks,
Managing Directory,
EB Consulting,
Secondsight

ADVISER CATEGORY JUDGES



Dan Cockram,
Sales Director,
Partners&



Mark Futcher,
Partner and Head of DC
and Workplace Wealth,
Barnett Waddingham



Stephen Hackett,
Head of
Corporate Benefits,
Benefex



Jason Marley,
Managing Director,
Kerr Henderson



Sorangi Shah,
Client Director,
Benefiz



Ian Beestin,
Co-founder &
Studio Director,
Money Alive



Renny Biggins,
Head of Retirement,
The Investing and
Saving Alliance (TISA)



Paul Budgen,
CEO and Co-Founder,
My Time Pension



Rita Butler-Jones,
Head of DC at
Legal & General,
LGIM



Rashree Chhatrisha,
Reward Director –
pensions and benefits,
SAGA



Suzanne Clarkson,
Founder & Managing
Director, Coach House
Communications



Simon Ellis, Head of Business
Development - Workplace
Savings & Retirement,
Aviva



Emma Furlonger,
Head of Workplace
Distribution and Relationships,
Standard Life



David Harris,
Managing Director,
TOR Financial
Consulting



Jill Henderson,
Head of Workplace
Business Development,
Scottish Widows



Saq Hussain,
Founder,
Financial Education



Dave Lunt,
Distribution Director,
People's Pension



Dipa Mistry-Kandola,
Independent



Nick Roy,
Director, Client &
Partnership Development,
Aegon



Nicola Sinclair,
Head of Small Corporate
Account Management,
Bupa UK



Ron Wheatcroft,
Technical Manager,
Swiss Re



Paul Williams,
Head of Pensions and
Financial Wellbeing,
Travis Perkins

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corporate adviser 24 awards















THE JUDGING PROCESS

How the awards were judged

The Corporate Adviser Awards 2024 are divided into two groups – Adviser Awards, which are judged by key figures from providers, trade body representatives and other industry stakeholders, and Provider Awards, which are judged by the Corporate Adviser Judging Panel, a group of 30 very senior consultants, advisers and brokers representing virtually all the key intermediaries in the workplace benefits sector.

ADVISER AWARD CATEGORIES

Adviser categories are entered by written submission, with a case study. Advisers are asked to explain how they have excelled in their business across key criteria set for each category. Entries are then judged in a two-stage process.

In stage one of the judging process judges are asked to rank the written submissions. Scores are then averaged out and shortlists are generated.

The second stage of the judging process sees Adviser Category Judges come together to debate the shortlisted entrants and determine which firms deserve to win the award. Judges take into account the quality of the submission, but are also able to bring their own knowledge of the organisation to the debate.

However, any judge having a conflict of interest in any category is required to declare it and sit out that part of the judging session.

Awards are given on the basis of the majority view of the judging panel.

PROVIDER AWARD CATEGORIES

Provider categories are judged in a three-stage process. However the first stage is different to the adviser award categories. In stage one, the 30 members of the Corporate Adviser Judging Panel are asked to rank all providers in each category. These scores are then aggregated and shortlists created from those who have scored highest in this first round.

Providers are then invited to present a written submission explaining why they deserve to win the category for which they have been shortlisted.

Advisers then re-rank shortlisted providers based on their submissions.

These scores are used as a guide to support the final judging sessions, where advisers debate the merits of each provider and select winners. The panel is divided into groups of no more than 10 for the final judging sessions, which take place both online and in person in London.

As with the Adviser Award Categories, judges may base their decisions on both the provider's submission and their knowledge of the provider. Again, winners are based on the majority view of the panel.

WHAT JUDGES LOOK FOR

Both adviser and provider category judges look for clear, concise submissions that answer the brief. Judges bring their own experience of providers and advisers to the sessions, but will also mark down those organisations that present poor submissions.

Judges also look for case studies that are relevant to that particular category and that demonstrate the value given to both the employee/member and the employer. Statistics that bring this to life are generally well received by judges.

In some categories shortlists present 'David and Goliath' battles of bigger firms versus smaller firms. Just because firms are bigger does not mean they will always win. Judges expect more from bigger firms, meaning smaller firms that truly excel can score higher than bigger firms with greater capabilities that have put in an uninspiring submission.

ADVISER AWARDS SHORTLISTS

BEST PENSION ADVISER
Aspira Corporate Solutions
Barnett Waddingham
Benefex
Chase de Vere
LCP
PIB Employee Benefits
Wingate Benefit Solutions
XPS Pensions Group

BEST HEALTHCARE ADVISER
Aspira Corporate Solutions
BDHL
Benefex Financial Solutions
Corpad Employee Benefits
Lloyd & Co
MEC
PIB Employee Benefits
Sherwood Healthcare
Wingate Benefit Solution

BEST GROUP RISK ADVISER
Aldermont Group
Aspira Corporate Solutions
Benefex Financial Solutions
Chase de Vere
Corpad Employee Benefits
Lloyd & Co
Wingate Benefit Solutions
WTW

BEST PENSIONS LAW FIRM
Arc Pensions Law
Sackers

BEST HEALTH & WELLBEING SOLUTION
Aspira Corporate Solutions
Caunce O'Hara Insurance Brokers
LCP

BEST DC INDEPENDENT TRUSTEE
Independent Governance Group
Capital Cranfield
Pan Trustees
Vidett
Zedra

CORPORATE ADVISER FIRM OF THE YEAR
advo
Benefiz
Benefex Financial Solutions
Caunce O'Hara Insurance Brokers
Corinthian Benefits Consulting
LCP
Lloyd & Co Employee Benefits
Westminster Wealth Management
PIB Employee Benefits

CORPORATE ADVISER SMALL FIRM OF THE YEAR
Aldermont Group
Benefiz
Caunce O'Hara Insurance Brokers
Corpad Employee
Benefits Limited
Generation Employee Benefits
Lloyd & Co Employee Benefits
Mearns & Company
MEC
Wingate Benefit Solutions

corporate adviser
PROVIDER SERVICE RATINGS 2024

CORPORATE ADVISER PROVIDER SERVICE RATINGS

WORKPLACE PENSIONS
FIVE STARS
Royal London
Standard Life
FOUR STARS
Aviva

GROUP RISK
FIVE STARS
Canada Life
FOUR STARS
Unum

CORPORATE HEALTHCARE
FIVE STARS
Vitality

CORPORATE CASH PLANS
FIVE STARS
Medicash
FOUR STARS
Simplyhealth

THE WINNERS

CORPORATE ADVISER FIRM OF THE YEAR 2024
PIB Employee Benefits

Highly Commended
LCP

CORPORATE ADVISER SMALL FIRM OF THE YEAR 2024
Benefiz

Highly Commended
Generation Employee Benefits
Wingate Benefit Solutions

BEST PENSIONS ADVISER
Barnett Waddingham

Highly Commended
LCP

BEST HEALTH & WELLBEING SOLUTION
Titan Corporate Benefits

BEST GROUP RISK ADVISER
Titan Corporate Benefits

Highly Commended
Benefex

BEST DC INDEPENDENT TRUSTEE
IGG

BEST HEALTHCARE ADVISER
Sherwood Healthcare

BEST GROUP PENSIONS PROVIDER
Aviva

Highly Commended
Standard Life

BEST PROVIDER DECUMULATION STRATEGY
Aviva

Highly Commended
Mercer

BEST MASTER TRUST
Standard Life Master Trust

Highly Commended
Legal & General Mastertrust

Honourable Mention
Aon Mastertrust

BEST ESG ASSET MANAGER
BNP Paribas

ULTIMATE DEFAULT FUND
Fidelity FutureWise

BEST DEFAULT ESG STRATEGY
Aviva

Highly Commended
Legal & General

BEST DC UNLISTED ASSET MANAGER
Natixis

Highly Commended
Schroders

BEST PENSIONS LAW FIRM
Sackers

BEST GROUP RISK PROVIDER
Zurich

Highly Commended
Canada Life

BEST HEALTHCARE PROVIDER
Vitality

Highly Commended
Bupa

Honourable Mention
Benenden

BEST CASH PLAN PROVIDER
Medicash

Highly Commended
Health Shield

BEST EMPLOYEE BENEFITS TECHNOLOGY PLATFORM
Zest

Highly Commended
Avantus

BEST FINANCIAL WELLBEING PROVIDER
Cushon

BEST HEALTH & WELLBEING INNOVATOR
Vitality

Highly Commended
TELUS Health

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Our workplace pensions give a wide range of options

- Employees get flexible investment and retirement options
- Employers get simple setup and admin

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PIB Employee Benefits David Skinner receives the award from Corporate Adviser editor John Greenwood and awards host Hugh Dennis

CORPORATE ADVISER FIRM OF THE YEAR

WINNER
PIB Employee Benefits

PIB has earned the prestigious title of "Firm of the Year," a recognition of its innovative approach and exceptional achievements in the field. A key factor in PIB's success is its unique strategy of structuring consulting teams around emerging challenges and risks, allowing it to provide holistic, well-rounded advice to clients. PIB ensures that consultants can support clients across various areas, including insured benefits, pensions, voluntary benefits, and employee wellbeing by strategically hiring top talent. This year, PIB's proprietary data development included commissioning two YouGov surveys to address employee needs and wellbeing strategies, leading to targeted campaigns and significant client engagement. Additionally, PIB's annual 'blue sky thinking day' has been instrumental in aligning strategic objectives with client needs, resulting in high engagement and satisfaction. The firm's benefits technology platform, glo, has dramatically improved employee engagement rates, proving its effectiveness and appeal. Congratulations PIB, Firm of the Year 2024.

HIGHLY COMMENDED
LCP

Judges awarded LCP with a highly commended award for delivering a "brilliant" submission, demonstrating "logical thinking and a diverse client base". The firm showcased a strong case study on DB surplus access solutions and evidence of aligning expertise across its business, such as Health Analytics alongside Pensions Advice and the 'LCP Transform' approach. The submission highlighted support for clients' responsible investing aims and excellent employee engagement scores. Embracing AI and digital technology like the InsurSight benefits platform, LCP presented strong client case studies, clear purpose, and focus areas on three mega trends. The impressive work with well-known industry names and credentials solidified its commendable entry. Well done LCP.



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full report

the people's pension



Tim Gillingham and the team at Benefiz receive the award from The People's Pension chief commercial officer David Meliveo and awards host Hugh Dennis

CORPORATE ADVISER SMALL FIRM OF THE YEAR

WINNER Benefiz

Benefiz has earned the prestigious CA Small Firm of the Year award with its outstanding submission. Benefiz has delivered an impressive submission, showcasing its clear, succinct, and professional approach. Utilising technology for cost and benefit metrics and member engagement, Benefiz excels in supporting small corporates with offerings typically seen in larger firms. Benefiz differentiates through innovative technology use and remote support, ensuring low client costs.

The "one RM" approach, tiered offerings, and strong client case studies highlight its forward-looking strategy, including anticipating monthly payrolling taxable benefits from April 2026. The firm offers both bespoke and "off the shelf" options, with fresh ideas like personalised therapy. According to judges, Benefiz demonstrates "professionalism, innovation, and impactful client support", making it a standout choice for winner of this category. Congratulations Benefiz, CA Small firm of the year 2024.

JOINT HIGHLY COMMENDED

Generation Employee Benefits

Generation Employee Benefits has demonstrated significant value and innovation in its field with judges wanting to recognise its efforts with a highly commended award. Its submission showcased impressive thinking and articulation with one judge saying they "advertised themselves well in the case study". It gave a well-presented case study that highlighted the value of thorough client engagement. The firm's approach to both risk and pensions is commendable with one judge describing it as "a great balance". Generation excels in bringing together a range of benefits, utilising third-party resources, and enhancing employers' reward strategies.

Wingate Benefit Solutions

Judges also wanted to give Wingate Benefit Solutions with a highly commended award. Wingate has delivered a very strong entry, highlighting its Wellbeing Matrix that includes career planning and informs future benefit design. According to judges, the firm shows clear focus on staff, evident through its Platinum Investor in People award. The entry features excellent employer and employee feedback results, pricing transparency, and flexibility. The innovative 'Wingate Engage' platform includes gamification. Wingate's comprehensive case study showcases a broad range of services, with a strategic focus on both employer and employee needs, delivering significant financial savings. Well done Wingate.

SUSTAINABLE BENEFITS ADVISER: SPECIAL COMMENDATION – BENEFIZ

Benefiz has been given a special commendation for its commitment to sustainability in the delivery of employee benefits. The firm has integrated sustainability considerations through its procurement and advice process, and this year achieved B-Corp accreditation. It has also focused on offering clients sustainable products.

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Jennifer Flanagan & Andy Parker from Barnett Waddingham receive the award from Aegon director of consultant and adviser relationships Martin Trenchard and awards host Hugh Dennis

BEST PENSION ADVISER

WINNER
Barnett Waddingham

Barnett Waddingham takes home the Best Pension Adviser award with judges describing it as offering "truly independent consulting and advice". Judges praised its "agile and client-responsive nature" of the submission saying that the "standard was high throughout". Judged noted its up-to-date approach that addresses current employer and individual challenges effectively. They highlighted effective stakeholder management and market leverage to secure favourable client terms, emphasising independence and data-driven insights. According to the judges, case studies, such as those supporting Independent Schools and education engagement, demonstrated impactful strategies. Their growth in the independent schools sector and achievement of the Gold Investor in Customers award were noted as significant accomplishments. Judges recognised Barnett Waddingham for innovation, supported by strong evidence of effectiveness and leadership in consultancy, notably through tools like GEM and the Pearl proposition. The development of a communications strategy to help members assess retirement outcomes and make informed decisions was praised for its industry relevance. Congratulations Barnett Waddingham, Best Pension Adviser 2024.

HIGHLY COMMENDED
LCP

LCP was highly commended for its leadership in shaping pensions policy and demonstrating innovation. Judges praised its tools like responsible investing and AI-driven strategies, noting effective integration of health analytics with pensions with one judge saying it is a "lead in the AI conversation." Initiatives such as 'LCP Spark' were highlighted for fostering innovation. LCP's strong staff engagement and expertise in managing DB surpluses and illiquid assets were also noted, showcasing its industry influence and delivering significant financial benefits to clients through exceptional advisory and investment practices. One judge described the firm as "- a market leading team of subject experts achieving great things for their clients". Well done LCP.



Todd Rowlands of Titan Corporate Benefits receives the award from Corporate Adviser Deputy Editor Emma Simon and awards host Hugh Dennis

BEST HEALTH & WELLBEING SOLUTION

WINNER

Titan Corporate Benefits

Titan stood out for the Best Health & Wellbeing Solution award with its innovative Bionic Benefits platform, with one judge saying that "anything that makes benefits more affordable and accessible to all must be applauded."

The platform's success is backed by impressive facts and figures, demonstrating the positive impact the products and services offered can deliver. By providing the SME sector with a feature previously unavailable, the firm has created something that is useful to HR professionals within employers as well as employees, Titan has created a versatile solution.

Bionic Benefits can also appeal to larger corporates, effectively competing with bigger perks providers by offering comprehensive benefits, all in one place and at no extra cost. Titan's approach has brought significant flexibility and accessibility to employee benefits, meeting client objectives and setting a new standard in the industry.

Congratulations Titan, Best Health & Wellbeing Solution 2024.



Todd Rowlands of Titan Corporate Benefits receives the award from Corporate Adviser reporter Muna Abdi and awards host Hugh Dennis

BEST GROUP RISK ADVISER

WINNER
Titan Corporate Benefits

Titan impressed judges by demonstrating a 'commendable commitment to staying relevant and proactive' across the key areas impacting the industry, evidenced by its active involvement in Group Risk Development and contributions to trade press articles through the 'Raising the Profile Group'. This engagement initiative ensures it remains abreast of market changes and positions it at the forefront of industry developments. Its collaboration with pension and healthcare colleagues underscores its integrated approach to client service. Its proactive initiatives, such as facilitating MHFA training for client line managers through its GIP provider, exemplifies its client-centered approach beyond traditional services. Launching an EB platform for SMEs and providing training on LTA changes further highlight its commitment to market growth and client support. Titan has demonstrated "proactive leadership and innovation", enhancing access to benefits and reinforcing its role as a trusted advisor in the industry. Congratulations Titan, Best Group Risk Adviser 2024.

HIGHLY COMMENDED
Benefex

Benefex presented a very strong and thorough entry with an excellent case study, impressing judges, who wished to give it a highly commended recognition. The company's strategy of reducing costs to create a benefits pot for employees is commendable, resulting in a significant increase in benefit selections among lower-paid employees from 19 per cent in 2022 to 91.9 per cent in 2023. The effective use of additional benefits and measurement of usage, as well as the inclusion of GIP and flex benefits, highlights its dedication to enhancing employee satisfaction and engagement.
Well done Benefex.

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Priti Ruparelia from Independent Governance Group receives the award from Scottish Widows Head of Workplace Business Development Jill Henderson and awards host Hugh Dennis

BEST DC INDEPENDENT TRUSTEE

WINNER
Independent Governance Group

IGG emerged as the deserving winner of Best DC independent trustee, recognised for its exceptional impact and leadership in the master trust market. IGG has demonstrated outstanding engagement with key issues impacting large pension schemes and trustees, exemplified by its pioneering Sustainability Charter aimed at achieving optimal member outcomes and leading sustainability initiatives in pensions with one judge saying that it is "something to be proud of." IGG has consistently shown dedication to governance excellence and innovation. Its strategic contributions to government pension agendas and active participation in industry forums underscore its influence and thought leadership, explained one judge. With a robust DC Governance Framework ensuring transparency and member satisfaction, and a track record of technical expertise in merging master trusts, IGG sets a benchmark in the industry. This award celebrates its commitment to enhancing pension governance, scale in the master trust sector, and invaluable contributions to shaping industry standards and best practices. Congratulations IGG, Best DC independent trustee 2024.



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Sherwood Healthcare's John Crisford receives the award from Bupa UK head of corporate new business Lorri-Ann Gillies and awards host Hugh Dennis

BEST HEALTHCARE ADVISER

WINNER
Sherwood Healthcare

Sherwood's submission for the Best Healthcare Adviser award excelled with effective member communications and clear criteria fulfilment with one judge saying, "a big sense of 'warmth' and 'care' from this adviser comes across." Its case study highlighted the use of the Employee Assistance Program (EAP) to address financial issues, demonstrating a strong sense of care and the connection between financial and overall wellbeing. Sherwood's unique approach of consulting employees, rather than relying solely on standard benchmarking, led to successful outcomes. The inclusion of valuable EAP legal support anecdotes and efforts to help employers maximise benefits showed Sherwood's commitment to comprehensive employee support. Additionally, directors mentoring junior staff underscored its dedication to talent development. One judge said that it had an ability to understand employees and benefits and maximise value. Another judge said, "Sherwood feels different from what others are doing in this space, it's new and exciting." Sherwood's innovative strategies and solid consulting have made a significant impact, earning it the Best Healthcare Adviser award. Congratulations Sherwood, Best Healthcare Adviser 2024.

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Workplace pensions that deliver

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Aviva's Victoria Panormo receives the award from Buck principal, DC proposition leader John Yates and awards host Hugh Dennis

BEST GROUP PENSIONS PROVIDER

WINNER Aviva

"We are honoured to receive the Best Group Pension Provider of the Year award at the 2024 Corporate Adviser Awards. This prestigious award underscores our unwavering commitment to excellence and innovation in the workplace pension industry.

"At Aviva, we're working hard to make sure all our members get better retirement outcomes. From making it easier to invest responsibly, supporting financial wellbeing, and closing the gender pension gap to helping customers with vulnerabilities feel empowered, we're determined to shape a better future for all our pension customers. We're one of 11 employers which are at the forefront of ensuring their workers have decent living standards now and in the future by being Living Wage, Living Hours and Living Pension accredited. Beyond that, we're building stronger, more resilient communities across the UK, with 2 per cent of annual profits directly invested in the community. With a broad team of talented, dedicated, experienced people on board, we're shaping a brighter financial future for all."

Victoria Panormo, Head of Client Relationships | Workplace Savings

Aviva excelled in the group pension provider category with judges praising the firm for maintaining a consistently strong proposition, with significant enhancements in the Guided Retirement offering, enriching the overall package. Service provision remained robust, bolstered by effective CRM for clients. The "three pot" solution received particular praise for its simplicity and practicality, offering a disciplined approach for unadvised clients and mitigating the risk of financial depletion. Aviva's focus on supporting members during the decumulation phase, a period often neglected by many providers, was highlighted through innovative solutions such as the guided retirement offering and retirement seminars, which demonstrated high member engagement. Aviva was recognised as a "solid all-rounder", with continuous improvements in its proposition, positioning it favourably among its peers. Congratulations Aviva, Best Group Pension Provider 2024.

HIGHLY COMMENDED

Standard Life

Standard has earned a highly commended award, with judges, emphasising its purpose-driven mission to "help people secure a life of possibilities." The balance between technological innovation and personal connections, as well as recent improvements like member app tools, were highlights. Standard Life demonstrated a strong member focus and understanding of client needs, evidenced by initiatives like the homebuyer hub and support for vulnerable customers. The company has shown significant work in shaping the pension industry and understanding member views, contributing to a robust offering this year. Well done Standard Life.

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Aviva's Laura Stewart-Smith receives the award from EBC LLP partner Charlie Goodman and awards host Hugh Dennis

BEST PROVIDER DECUMULATION PROPOSITION

WINNER Aviva

"We're incredibly proud to have won the Decumulation Proposition of the Year Award at the Corporate Adviser Awards 2024. Pension savers have important decisions to make in preparation for their retirement and we're committed to supporting them in making the right choices.

"Almost 3.4 million 32–40-year-old defined contribution pension savers, could accumulate £225,000 or more in pension savings by the time they retire in 2050, which highlights the support needed by members to navigate incredibly complex decisions about how to convert their pension wealth into a decent income stream throughout retirement.

"At Aviva we are committed to supporting the retirement experience of our members and have worked hard to help those entering the retirement phase to boost understanding and make the most of their pension pot. This prestigious award recognises the focus we're giving this area."

Laura Stewart-Smith, Head of Client Engagement | Workplace Savings

One of three awards on the night, Judges praised Aviva's Guided Retirement for its engaging and creative approach to the decumulation conundrum. Aviva's innovative solution includes financial education through webinars and tools, underpinned by its research-based planning for retirement report. The guided pathways solution, particularly beneficial for non-advised clients, and access to tax advice were noted as impressive. The mix of in-person and digital support, along with guidance and advice for various pot sizes, demonstrates a strong decumulation proposition. Aviva's 'three-pot' Guided Retirement model is seen as ahead of others and likely to influence future industry practices. Communication improvements and thoughtful consideration of different retirement outcomes further strengthen Aviva's offering. With solid developments over the year, Aviva ensures no plan holder is left without support, making it a robust and comprehensive decumulation proposition. Congratulations to Aviva.

HIGHLY COMMENDED

Mercer

Judges commended the triage service and digital advice via Hub for making advice more affordable and accessible to members. They highlighted the impressive advice services, ongoing planning, and annuity broking available to employees. Mercer's strong focus on advice to aid planning was noted as positive, with a well-positioned third-party solution offering comprehensive support to members at retirement, making it a strong and valuable proposition. Well done Mercer.



Standard Life's Ross Willmott receives the award from Corporate Adviser group commercial director Ricardo Medina and awards host Hugh Dennis

BEST MASTER TRUST

WINNER
Standard Life Master Trust

Judges praised the Standard Life Master Trust for its strong overall proposition, especially in engagement and recent improvements to the default fund, which have enhanced returns for members. They noted innovation in areas like interactions with DB surpluses and accelerated trustee training, as well as a broad range of strengths including track record, member engagement, and suitability for retirement. The pioneering Trustee Accelerator Programme was highlighted as a standout in diversity efforts. Standard Life's demonstrated robust functionality and significant development in recent years, positioning it well to win new business and secure more opportunities at the RFP stage. The judges appreciated the flexibility offered by allowing access to drawdown for smaller single trust schemes and its effective management of DB surpluses. Congratulations Standard Life, Best Master Trust 2024.

HIGHLY COMMENDED
Legal & General Mastertrust

Legal & General's master trust proposition was highlighted as one of the UK's best offerings, with judges citing its substantial advancements in engagement over the past year. Judges particularly noted innovations such as the new app and enhanced communications which integrate DE&I elements. The launch of a new default fund offering broader access to illiquid investments and improvements like refreshed microsites and MySU administration enhancements were also applauded. LGIM's robust track record, commitment to client and member feedback-driven development, and comprehensive proposition affirm its leadership in non-bespoke solutions, poised for further business expansion. Well done Legal & General.

Honourable Mention
Aon Mastertrust

Judges wanted to give an honourable mention to Aon, commending its innovative, client-led design and active oversight of the default fund during market volatility, combining agile innovation with strong performance returns. They highlighted its impressive proposition and strong returns, noting the blended solution's effectiveness in reducing employers' governance burdens.



BNP Paribas Asset Management's Phil Dawes receives the award from Benefits Expert editor Claire Churchard and awards host Hugh Dennis

BEST ESG ASSET MANAGER

WINNER
BNP Paribas

BNP Paribas Asset Management (BNPP AM) earned the title of Best ESG Asset Manager for its exceptional performance, managing €540 billion in assets across 34 countries. The firm's strong performance in ESG asset management, supported by independent assessments, and its extensive contributions beyond workplace pensions were particularly commended. Its strategy focuses on sustainable long-term returns by embedding sustainability in operations. BNP Paribas is at the forefront of driving the transition to a sustainable economy with innovative investment products such as climate-focused strategies and the Climate Impact Infrastructure Debt fund. Its approach includes robust ESG frameworks, proactive stewardship, and significant climate and biodiversity commitments, establishing them as a global leader in responsible investment. Judges noted BNP Paribas' "long track record in ESG", including making 90 per cent of its funds sustainable and substantial investments aligned with the Paris Agreement, including notable ventures like its partnership with a Danish wood company. Congratulations BNP Paribas, Best ESG Asset Manager 2024.

For scheme sponsors, trustees, their advisers and consultants use only.



corporate adviser awards 24
WINNER
Ultimate Default Fund

FutureWise: the ultimate default fund

Award winning investment strategy

Market leading net zero progress

Innovation successfully delivering on member outcomes

At Fidelity, we recognise our members are entrusting us to build better financial futures for them. This is a huge responsibility, and one that we don't take lightly.

With FutureWise, our 'focus on both member outcomes and financially-grounded sustainability' have been instrumental to the strategy's success. Our Target Date Fund (TDF) structure focuses on simplifying the member experience and reflects our long term commitment to delivering a market leading solution that can navigate markets and deliver ongoing investment innovation.

Our continued conviction has seen;

- Assets under management grow from £5 billion in 2022 to over £12 billion in 2024.
- TDFs reducing our carbon footprint by 61.4% to the end of 2022, exceeding our target of halving emissions by 2030.
- A default option built on transparency and strong governance, integral to building trust and partnership growth for our clients.

This recognition from our industry peers gives us confidence that our TDF strategy is meeting the needs of our clients and delivering good member outcomes.

Visit **fidelity.co.uk/futurewise** to find out more about our award winning fund.

Workplace Investing

Fidelity INTERNATIONAL

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James Monk from Fidelity receives the award from Capita senior DC pension consultant Jeanette Smith and awards host Hugh Dennis

ULTIMATE DEFAULT FUND

WINNER
Fidelity FutureWise

Fidelity's FutureWise target date default offering took home the Ultimate Default Fund award at this year's awards with judges commending its excellent performance driven by a single, sustainable strategy.

The fund's diversity and positive returns for an appropriate level of volatility were highlighted, with effective performance in negative markets, especially for retiring members.

Fidelity's strong ESG credentials and proprietary tools were also praised. The emphasis on simplicity by not incorporating variations for pension freedoms was appreciated.

According to the judges, the submission clearly demonstrated Fidelity's focus on member outcomes, making it a robust and commendable proposition. Congratulations Fidelity FutureWise, Ultimate Default Fund 2024.

"We are delighted to receive this recognition for FutureWise as the Ultimate Default. The Target Date Fund (TDF) structure focuses on simplifying the member experience, while delivering investment sophistication with the objective to maximise member pots at retirement. The TDF structure reflects the long term commitment to deliver a market leading solution that requires the ability to navigate markets and deliver ongoing investment innovation.

"Fidelity's 'culture of innovation' and the 'focus on both member outcomes and financially-grounded sustainability' have been instrumental in the strategy's success. We are delighted to see that the TDF strategy has seen FutureWise's AUM grow from £5bn in 2022 to over £12.7bn in 2024, with many more clients committed to join FutureWise.

"The TDFs have reduced FutureWise's carbon footprint by 61.4% to the end of 2022, exceeding our target of halving emissions by 2030 and delivering a strong carbon footprint and ESG profile, importantly while maintaining diversification principles across sector and region. The focus on a transparent and strong governance structure has also been key to building trust and partnership with our clients, that is of paramount importance to us.

"We recognise that members are entrusting us to build better financial futures for them – this is a huge responsibility, and one that we don't take lightly. This recognition from our industry peers gives us confidence that our TDF strategy is meeting the needs of our client, but we are always looking for developments to enhance this strategy further. Thank you to our clients and industry peers who have supported us in winning this award."
The team at Fidelity Workplace Savings

AVIVA

Aviva Workplace Pension

Workplace pensions that deliver

Our workplace pensions give a wide range of options

- Employees get flexible investment and retirement options
- Employers get simple setup and admin

The value of investments can go down as well as up. Employees may get back less than has been paid in.



Search Aviva Workplace Savings to find out more

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Aviva's head of investment strategy and propositions Maiyuresh Rajah receives the award from Kerr Henderson director Jason Marley and awards host Hugh Dennis

BEST DEFAULT ESG STRATEGY

WINNER Aviva

"We're thrilled to be recognised as an industry leader for ESG default design as winner of the Best ESG Default Strategy award. As one of the UK's leading Insurance, Wealth, and Retirement businesses and with a strong track record in sustainability across Aviva and Aviva Investors, we're driving change using sustainable investing. We have a responsibility to act on behalf of our customers and through our default strategies we can help our customers invest for the future and achieve good outcomes in retirement.

"The UK – and indeed, the world - has faced periods of what might be considered unprecedented uncertainty over the last few years. At a time like this, it's crucial for investors to use their voice and actions to make a difference and our default strategies give investors the opportunity to do just that.

"We'd like to take this opportunity to thank our investment partners for helping us deliver our award-winning default ESG strategy."

Maiyuresh Rajah, Director of Investments | Wealth

Aviva earned accolades for its My Future range which judges described as having robust performance, harnessing Aviva's substantial assets to foster meaningful engagement with companies. Aviva's quarterly reporting on ESG activities, bolstered by collaboration with Aviva Investors, provides comprehensive information for employers and members alike. Judges were impressed by Aviva's proactive approach, emphasising sustained engagement over superficial adjustments. They highlighted Aviva's notable achievements, including a positive SBTi criteria assessment and an ambitious Net Zero target of 2040, setting a benchmark ahead of many default strategies. Congratulations Aviva, Best Default ESG Strategy 2024.

HIGHLY COMMENDED

Legal & General

Legal & General was highly commended by judges for its long history of ESG focus and consistently surpassing its carbon-neutral targets. Judges noted the positive impact of addressing each ESG element, highlighting the clear naming and purpose of the Climate Action Fund and its engagement with laggards. Recent enhancements over the past 12 months and a holistic approach with 34 metrics earned praise for strong integration, ratings, and quality of ESG reporting. Well done Legal & General.



James Lindsay of Natixis Investment Managers receives the award from Lane Clark & Peacock LLP principal, Simon Jackson and awards host Hugh Dennis

BEST DC UNLISTED ASSET MANAGER

WINNER Natixis Investment Managers

Natixis received high praise for its diverse range of offerings, with particular commendation for its private credit solutions. Judges highlighted the adaptability of Natixis' private credit offerings to meet specific scheme requirements, especially the dual-credit fund that provides a structured approach to accessing unlisted assets and addressing pricing challenges in the private market. Natixis was recognised for its adept handling of complex areas such as liquidity and valuation, and its innovative approach to performance fees. Judges appreciated Natixis' clear alignment with the UK market and its proactive, member-centric approach. Congratulations to Natixis.

HIGHLY COMMENDED

Schroders

Schroders received a highly commended award with judges praising its outstanding performance in the DC pension space. This year, it expanded its investment philosophy to enhance private market opportunities, launching the UK's first Long-Term Asset Fund, Schroders Capital Climate+ LTAF, and Schroders Greencoat Global Renewables+ LTAF. These funds provide diversified private assets with a focus on climate impact, supporting the Mansion House Compact and encouraging contributions to the UK's net-zero transition. Schroders' innovative use of ESG principles, combined with strong client engagement and investment flexibility, highlights its commitment to excellence in unlisted asset management. Well done Schroders.



Sam Taylor and Sophia Russell from Sackers receive the award from Benefex head of workplace savings Andrew Barradell and awards host Hugh Dennis

BEST PENSIONS LAW FIRM

WINNER Sackers

Sackers emerged as the distinguished winner of this category, celebrated for its outstanding achievements and "depth of expertise" in the pension industry. Its submission highlighted tangible successes with named clients, including groundbreaking work with Sears that significantly improved member outcomes. The firm's proactive engagement across the industry is exemplary, underpinned by strong thought leadership and innovative solutions to complex client challenges. Sackers' commitment to Diversity, Equity, and Inclusion (DE&I) is commendable, reflecting in its diverse workforce and leadership in industry collaboration. Sackers is noted for advising the first Superfund transaaction, marking a pioneering milestone. With an impressive track record advising numerous top pension schemes and a robust stance on employee diversity, Sackers exemplifies excellence and leadership in the field. This award recognises its depth of expertise, thought leadership, and significant contributions to shaping industry standards. Congratulations Sackers, Best pensions law firm 2024.



Zurich's Clare Poolman receives the award from Mattioli Woods head of health & wellbeing benefits Ed Watling and awards host Hugh Dennis

BEST GROUP RISK PROVIDER

WINNER Zurich

Zurich triumphed in this key category wit its "great all-round proposition", highlighting the value in claims management and the benefits of its portal with expanding service access. They appreciated Zurich's submission, which introduced numerous new initiatives and covered all aspects comprehensively. Ancillary services and adviser technology were noted as strong, with competitive pricing and a growing industry presence. Zurich's claims experience and NPS ratings aligned well with expectations, and its underwriting was deemed effective. Overall, Zurich's entry showcased a strong wellbeing proposition, particularly in Group Risk, making them a standout competitor in the field. Congratulations Zurich, Best Group Risk Provider 2024.

HIGHLY COMMENDED

Canada Life

Canada Life's strong performance caught the eye of judges who wanted to recognise it for its providing a first-class customer and intermediary experience. Judges noted market-leading support services like Toothfairy and WeCare, which are increasingly accessible beyond the insured population. Canada Life's emphasis on human connection and quick, effective responses over the phone was highlighted as a significant advantage. While the submission focused heavily on Toothfairy, judges appreciated Canada Life's overall strong proposition and continued leadership in the Group Risk market, supported by robust adviser tech support and adaptable ancillary benefits. Well done Canada Life.

HONOURABLE MENTION

Legal & General Group Protection

Judges wanted to give Legal & General Group Protection an honourable mention following its submission. The comprehensive inclusion of the SME market, competitive pricing, excellent documents, effective adviser technology, three-year rate guarantees, and the addition of FI impressed the judges. Legal & General's 2023/24 proposition is robust and innovative, making it a standout contender.



Vitality's Pippa Andrews receives the award from Verlingue head of employee benefits Mark Pugh and awards host Hugh Dennis

BEST HEALTHCARE PROVIDER

WINNER Vitality

Vitality impressed judges with its strong proposition and significant developments, positioning them as one of the leading PMI providers with competitive pricing. They praised the ease of use of its app and improvements in the broker space. Vitality's regular innovation, frequent communications, and efforts to support broker business were noted positively. The integration of digital GP services and advancements like CARE hub and Skin AI analytics were highlighted as market-leading features. Vitality's enhanced Cancer Support and continued service improvements were recognised as positive steps. Judges acknowledged Vitality's strong submission and ongoing initiatives. Congratulations Vitality.

HIGHLY COMMENDED

Bupa

Judges praised Bupa for its superb submission, highlighting enhancements like the single app, digital wellbeing improvements, JAAQ, and enhanced management information for employers and advisers. They noted Bupa's strong proposition across large and small clients, with valued add-on and digital services that receive positive customer feedback. Bupa's Touch service was acknowledged as a successful addition. Judges agreed that Bupa's digital offerings are considered one of the best on the market, underscoring its strong market growth and commitment to innovation. Well done Bupa.

HONOURABLE MENTION

Benenden Health

Judges wanted to give Benenden an honourable mention following its submission. Its product development was deemed excellent, particular its group products and services. The proposition focuses deeply on preventative care, supported by a robust app and complementary services like discounts and rewards.



Paul Gambon of Medicash receives the award from Corporate Adviser commercial director Oonagh Sheehan and awards host Hugh Dennis

BEST CASH PLAN PROVIDER

WINNER Medicash

Medicash won this category with judges highlighting it's "fantastic success story" and market growth. Judges were impressed by its innovative offerings like Skin Vision, Phio, and DNA insights, which have driven significant market growth. They commended Medicash's excellent digital platform, noting its user-friendly app for seamless claiming—a standout in the industry. Judges acknowledged Medicash's sustained market leadership, clear proposition flexibility, and strong customer service. They emphasised Medicash's continued product development and effective use of adviser tools, underscoring its dominant position in the cash plan market. According to the judges, Medicash has demonstrated robust growth and ongoing innovation, reinforcing its status as a top player in its sector with one judge saying, "they didn't take their eyes off the ball." Congratulations Medicash, Best Cash Plan Provider 2024.

HIGHLY COMMENDED

Health Shield

Health Shield received a highly commended award for its strong submission and excellent service results. Judges noted the Breeze app's user-friendly interface, which simplifies the claiming process. Health Shield's Tailored proposition was highlighted for its flexibility, with the new Select solution noted as competitive. The cash plan was praised for its ease of use and comprehensive additional services, catering to diverse member needs. Health Shield demonstrated responsiveness to market demands and improvements to its proposition, aligning them more closely with market standards. Well done Health Shields.



The team from Zest, including Matt Russell (holding award) receives the award from Secondsight principal, health & protection Anne Drugnick and awards host Hugh Dennis

BEST EMPLOYEE BENEFITS PLATFORM

WINNER Zest

Zest's comprehensive solution was praised by judges, enabling both advised and direct employers to effectively manage its benefits. The recent development of insight and engagement centers, along with the user-friendly App, were highlighted as game-changers. Zest's submission was noted for its strong coverage across all areas including management information use, user experience, coding strength, functionality, HRIS/HCM software integrations, and marketplace offerings. With a proven track record and ongoing innovation, Zest impressed with its focus on product development and the inclusion of testimonials. The flexibility, personalisation, and simplicity of its platform stood out, particularly its ability to build benefits without requiring coding expertise with one judge saying "- it is sophisticated in terms of the bespoking you can do". Judges believe Zest's technology shows promising potential, supported by clear and appreciated dashboards for clients. Its use of channel partners to expand market reach was also recognised as effective. Judges said Zest presented a solid submission, positioning itself well in a competitive market with innovative solutions and strong customer satisfaction metrics like its exceptional NPS. Congratulations Zest, Best Employee Benefits Tech 2024.

HIGHLY COMMENDED

Avantus

Avantus was awarded high commendation, recognised by judges for affordability and broad applicability of its technology. It leads in employee benefits tech with innovations in scalability and client empowerment. In 2023, Avantus saw substantial growth, with more advisers adopting its technology for corporate clients. The FlexGenius platform delivers efficient, reliable service globally, achieving a 50% increase in white-label partners and 300% growth in international markets. Avantus offers tailored solutions, ensuring advisers operate smoothly and cost-effectively, solidifying its position in advancing employee benefits administration. Well done Avantus.



The team at Cushon receives the award from NFP Europe head of consulting David O'Reilly and awards host Hugh Dennis

BEST FINANCIAL WELLBEING PROVIDER

WINNER Cushon

Cushon impressed judges with its focused approach to financial wellbeing, particularly in addressing the challenge of pension engagement and sustainability. One judge was impressed with how the firm "set out very clear objectives and gone and delivered on it." They noted Cushon's effective use of technology for both employees and employers, enhancing its proposition. The submission highlighted valuable features such as investment notifications and a clear commitment to pension wellbeing, which resonated well with customers. Cushon's strategy of concentrating on a singular issue—engagement in sustainable investments—was seen as a strength, allowing them to measure impactful improvements in this area. Judges recognised Cushon's potential for continued evolution in its already strong proposition, although they noted a need for clearer differentiation in the market and more detailed insights into its impact on improving financial wellbeing. Congratulations Cushon, Best Financial Wellbeing Provider 2024.



Vitality's Pippa Andrews receives the award from Isio senior manager Kevin Grant and awards host Hugh Dennis

BEST HEALTH & WELLBEING INNOVATOR

WINNER Vitality

Vitality was awarded for its outstanding contributions to the PMI market with judges praising the firm saying it had "innovation down to a fine art". Judges praised Vitality for its innovative partnerships with preventative health and lifestage providers, underscoring its commitment to advancing healthcare solutions. Vitality's leading wellbeing programme was recognised as both unique and market-leading, supported by its impressive use of data to enhance wellbeing outcomes. The judges also acknowledged Vitality's continuous innovation, which includes engaging webinars with sports stars and an interactive app that tracks engagement and offers rewards, integrated with comprehensive support through its care hub. Vitality's strong proposition and innovative approach have firmly established them as a leader in the industry. Congratulations to Vitality, Best Health & Wellbeing Innovator 2024.

HIGHLY COMMENDED

TELUS Health

Judges commended TELUS Health for its adaptable and client-specific standalone proposition, integrated with advanced HR technology suites. TELUS Health impressed judges with robust data-backed evidence showcasing impactful responses during global crises, demonstrating a steadfast commitment to support in challenging times. TELUS Health's differentiated strategy in the EAP market was highlighted for its positive impact. Well done TELUS Health.



Royal London's James Phillips receives the award from Corporate Adviser editor John Greenwood and awards host Hugh Dennis

corporate adviser
PROVIDER SERVICE RATINGS 2024

WORKPLACE PENSIONS

Royal London

This is the fourth year running that Royal London has received a Five Star Service Rating — demonstrating the consistently high service standards it has achieved over a number of years. Advisers particularly rated the strong support content Royal London produces, and commented on its good communication. Both reflect the importance Royal London places on working with advisers and consultants, to deliver better outcomes for clients.



Standard Life's Stephanie Coventry receives the award from Corporate Adviser editor John Greenwood and awards host Hugh Dennis

corporate adviser
PROVIDER SERVICE RATINGS 2024

WORKPLACE PENSIONS

Standard Life

Standard Life has significantly improved its service standards, moving from a three-star rating last year, to take a coveted Five Star Service Rating for 2024. It was a consistently high scorer in most categories but advisers particularly rated its market-leading technology. This improvement in service standards is all the more impressive as it comes at a time of strong organic growth for the pension provider, demonstrating it can maintain standards as the business grows.



Canada Life's Dan Crook receives the award from Corporate Adviser editor John Greenwood and awards host Hugh Dennis

corporate adviser
PROVIDER SERVICE RATINGS 2024

GROUP RISK

Canada Life

Another strong year of service delivery for Canada Life, rewarded by a Five Star Service Rating from intermediaries. Consultants and advisers were particularly impressed with both the provider-generated adviser support content and staff expertise at the firm, with both these individual categories scoring an impressive rating of 80 per cent-plus. There was also a high rating for Canada Life's technology, with its CLASS platform continuing to prove popular with advisers and their clients.



Vitality's Pippa Andrews receives the award from Corporate Adviser editor John Greenwood and awards host Hugh Dennis

corporate adviser
PROVIDER SERVICE RATINGS 2024

HEALTHCARE

Vitality

Vitality's innovative reward-based insurance has proved popular with advisers and consultants in the healthcare market — but advisers and consultants also value the high service standards at the company, with the insurer being the only healthcare provider with a five-star rating. This marks a significant improvement in service standards, with Vitality moving from a Three Star to a Five Star Service rating in the space of 12 months. Overall, Vitality scored highest for communication, although advisers also thought it delivered excellent adviser-facing technology and provider-generated support content.



The team at Medicash receives the award from Corporate Adviser editor John Greenwood and awards host Hugh Dennis

corporate adviser
PROVIDER SERVICE RATINGS 2024

CASH PLAN

Medicash

When it comes to rating providers for their service standards Medicash received the highest overall score (of 83.7 per cent) of any insurer or provider in this report, not just in the cash plan section. It remains the only company — across the pensions, group risk, healthcare and cash plan sectors — to achieve scores of 80%-plus on every single category that advisers used to rate the service standards of individual providers, with its highest rating for staff expertise.

corporate adviser 24 awards















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