

Roger Urwin

WTW's Global Head of Investment Content & Co-founder of the Thinking Ahead Institute

Roger joined WTW to start the firm's investment consulting practice in 1989 and under his leadership the practice grew to a global team of over 500. During this time he was Global Head, between 1995 and 2008, and thereafter assumed the role of Global Head of Investment Content. In this role Roger consults to some of the firm's major investment clients around the world and generates thought leadership and leads projects within the Thinking Ahead Institute, which he co-founded in 2015.

Roger has worked on strategic issues for some of the largest and most complex asset owners globally. He has led significant engagements at among others RPMI-Railpen, CalPERS, ADIA, Future Fund, TCorp, Aware Super, New Zealand Super, BTPS, AP7 and USS in each case contributing to these organisations' governance and investment models. He is a strategic adviser to the Future of Finance initiative of the CFA Institute and an Advisory Director to MSCI Inc.

He can claim a number of innovations where he was the first to develop new investment content – notably the first lifecycle DC design in 1988 and the originator of governance budget and risk budget methods in the 2000s, as well as building out the fiduciary management model in 2008 and universal ownership model in 2011. He is also the author of many papers, including on: asset allocation policy, manager selection, sustainability, governance and transformational change.

In 2022, Roger received the CFA Institute Inspirational Leader Award for Professional Excellence for innovation and excellence of practice in the investment profession. He is a Fellow of the Institute of Actuaries, a Fellow of the Society of Investment Professionals and a graduate of Oxford University.

