

Thinking Ahead Institute | Annual briefing 2025

4 February 2025

Today's agenda



Welcome to Thinking Ahead – our past, present and future

2025 projects and research

How to make the most of the Institute

Q&A

TAI | past, present and future



Thinking Ahead Institute members | 38 asset owners | 15 asset managers

2015	2016/2017	2017/2018	2018/2019	2020	2021/2022	2022/2023	2023/2024
         	      	      	      	      	      	      	      

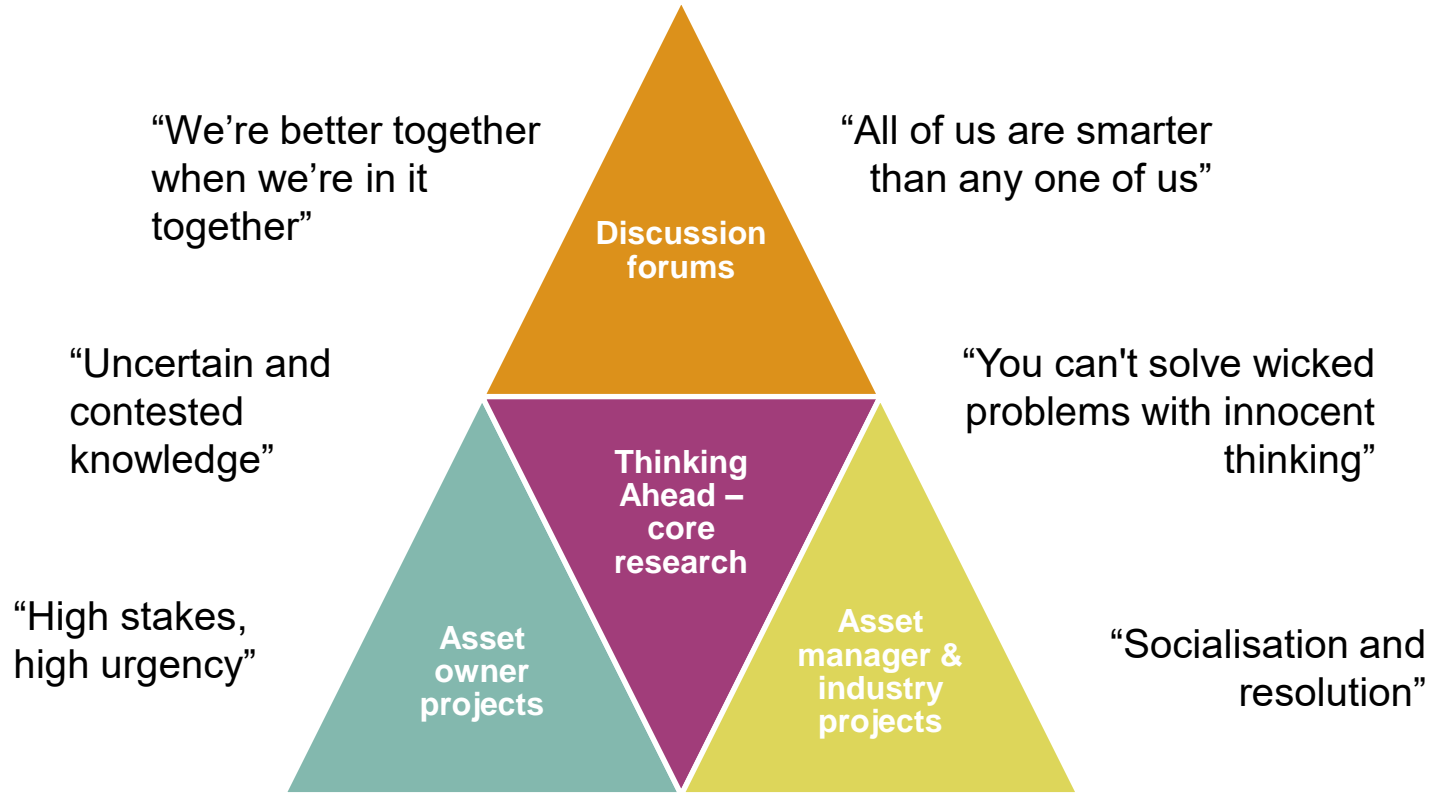
* Previously QSuper

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Thinking Ahead Institute
An innovation network founded by WTW

TAI change model

Driven by a belief that we exist within a complex, evolving, system



Discussion forums

Virtual, 90-minute, get-togethers to discuss important topics

We will host and moderate these discussions. We aim to include case studies where possible

Date	Suggested topic
27 Mar	Risk 2.0 managing long-term risks in a short-term world
12 Jun	AI the risks and opportunities
4 Sep	What does “3D investing” actually mean in practice?
6 Nov	Expectations for COP30 and net-zero investing

Limited
spaces per
meeting

Other topics? Private markets? Wealth?

1. Book your slot
2. Improve the topics
3. Offer a case study

TPA senior leaders' forum



Virtual series: 3 April, 1 May, 5 June and 3 July
(4 x 1.5 hours)

Output: Training materials, strategic 1-2-1s

Thinking Ahead Projects. In 2024 and into 2025



- The **2024 Global AO Peer Study** broke new ground in data, dialogue and innovative thinking



- This produced the first tranche of **Thinking Ahead projects** - 8 TAI AO projects in 2024 (assets of c\$1.5T)



- In **2025** we have restructured to accommodate the demand for projects, the pipeline is very strong



- **Org-alpha** is the common thread – *TPA, 3D Investing, Alts-Plus, Soft Stuff, Governance & Culture, HI x AI, Risk 2.0, ...* for AOs and AMs



TAI | Global Wealth Study 2025

Research scope

About the initiative

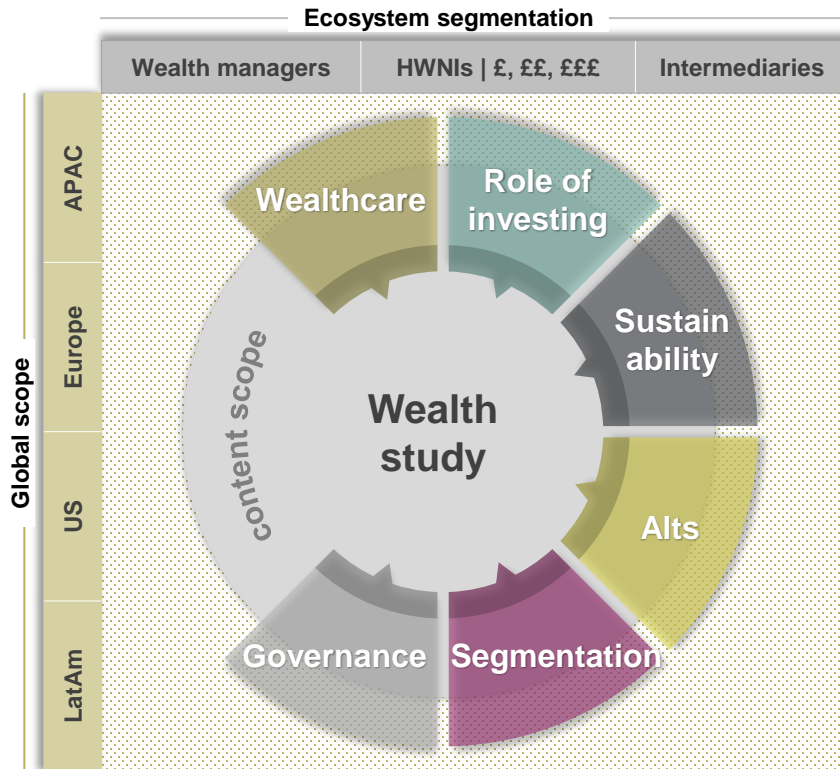
- Global thought leadership study

Mixed methods

- Survey-based quant research
- Qualitative interviews/focus groups
- Desktop research
- Internal WTW dissemination and local build-up

Output

- Comprehensive final report
- Potential findings working group in 2026



TAI global DC peer study 2025, in collaboration with LifeSight and Aware Super



Make comparisons of leading DC organisations

Convene CEO/CIOs to discuss industry issues

Facilitate sharing best practices among peers

Explore leading DC providers' structure

Offer insights into future directions for the DC pension market globally

In-person events: London, Sydney and others to be confirmed

Systems research



Systems curriculum - enhancing system thinking in your organisation

Expert opinions
from external
speakers

Thought
leadership
from TAI

A platform for
discussions

Curriculum program

0. Primer
1. Systemic risk
2. Systems leadership
3. Beliefs
4. Sustainability
5. Measurement

Five really
useful things

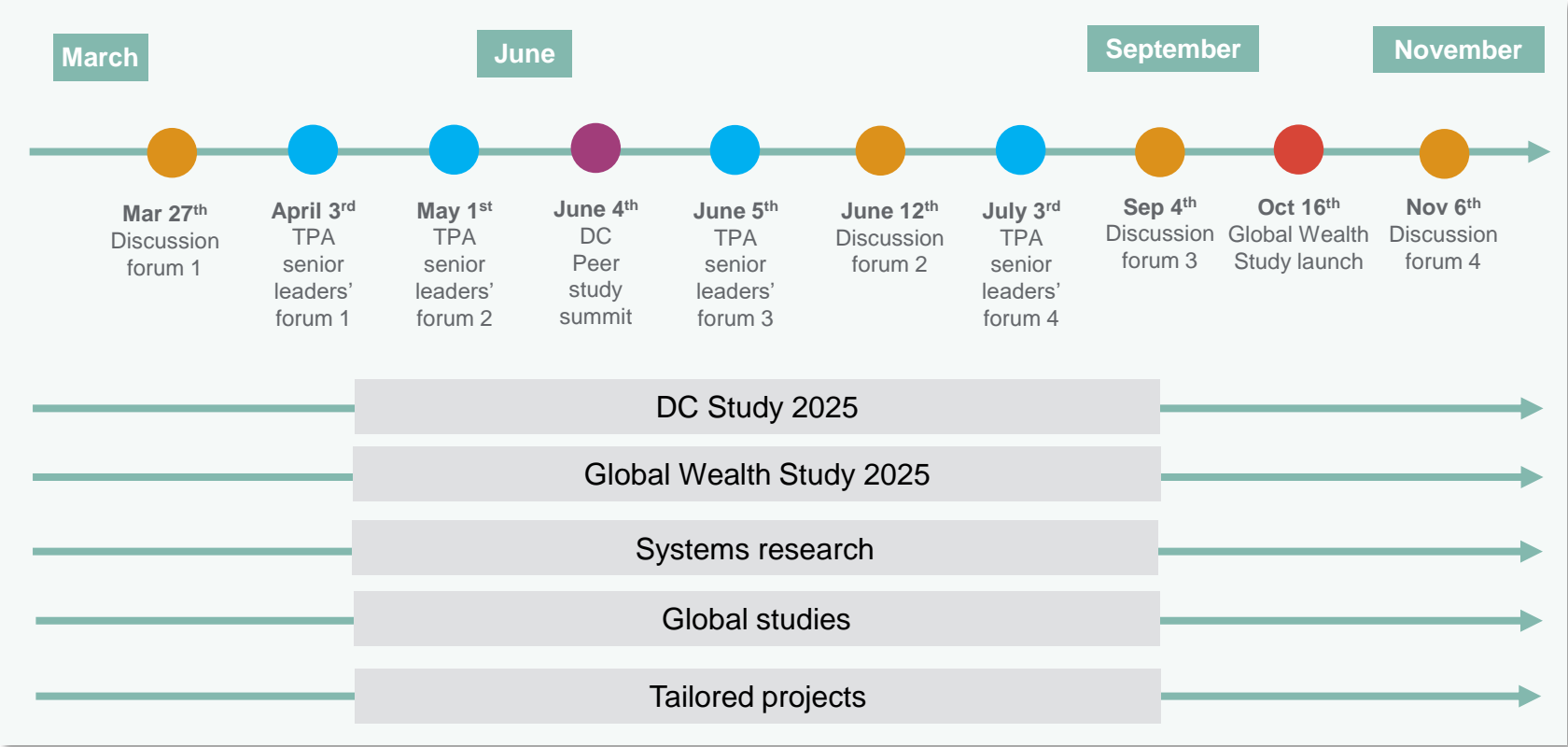
Expansion of
beliefs

Systemic risk
mitigation



Time commitment:	6 x 1.5 hours MS Teams calls, plus pre-reading
Session dates	May, June, September, October, November, December
Output	Training materials, strategic 1-2-1s

2025 research timeline



MANAGER IDEAS EXCHANGE

A global event series dedicated to exchanging ideas and collaborating with the asset management community.



THINKING
AHEAD
INSTITUTE



MANAGER
IDEAS
EXCHANGE



Bonus for members:



Special discount

on the MiX Global Partner
Package



Exclusive

invites to our global dinners
alongside WTW's senior leadership

What to expect in 2025

In-person events

12 FEB LONDON	SHAREACTION TOPIC: FIDUCIARY DUTY: SECURING THE LEGAL CHANGE WE NEED	4 JUN LONDON	EXCHANGE+ TOPIC: DC PEER STUDY
24-26 MAR MELBOURNE	MIX MELBOURNE 24 MAR: DINNER 25/26 MAR: MIX	15-17 SEP CHICAGO	MIX CHICAGO 15 SEP: DINNER 16/17 SEP: MIX
12-14 MAY LONDON	MIX LONDON 12 MAY: DINNER 13/14 MAY: MIX	NOV EUROPE	MIX EUROPE
MAY AUSTRALIA	AUSTRALIA VISIT A SERIES OF EVENTS	NOV LONDON	NETWORK+ RAPID-FIRE TALKS FEATURING THE BEST OF TAI'S RESEARCH

Virtual events

4 FEB	ANNUAL BRIEFING
27 MAR 12 JUN 4 SEP 6 NOV	DISCUSSION FORUM TOPIC: RISK 2.0 MANAGING LONG-TERM RISKS IN A SHORT-TERM WORLD
3 APR 1 MAY 5 JUN 3 JUL	TPA FORUM
16 OCT	PERSPECTIVES+ TOPIC: GLOBAL WEALTH STUDY LAUNCH

And more



PODCASTS

INVESTING FOR
TOMORROW



MEMO

RESEARCH, AGENDA,
EVENTS & LATEST
PAPERS



**FIND US
HERE**

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