**WEBSITE UPDATES – Feb – May 2025**

1. **Description: USING INVESTMENT TRUSTS TO HOLD ILLIQUID ASSETS HAS BENEFITS FOR PENSION FUNDS: Ros is quoted in Pensions Expert expressing her support for closed-ended investment structures to be used for investing in illiquid assets, such as those which the Government is encouraging with its Mansion House initiatives**

**Link https://www.pensions-expert.com/investment/should-pension-schemes-access-illiquid-markets-through-investment-trusts/69575.article**

**date. 28 July 2025**

**Sections. Investment Trusts + Pension Fund Asset Allocation**

1. **PENSION POVERTY SET TO INCREASE: Ros is quoted in the Daily Mail which is warning that pensioner poverty may increase as tax rules take more of their pension income away in future**

**Link https://www.dailymail.co.uk/news/article-14945719/Britain-pension-poverty-Rachel-Reeves-tax-grab-retirement-savings.html**

**Date: 27 July 2025**

**Sections: Pension Reform**

1. **PENSION SCHEMES BILL IS WRONG TO EXCLUDE PENSION FUNDS FROM INVESTMENT TRUSTS : Ros is quoted in IFA Magazine, backing calls by the AIC to ensure the Government recognises that UK-listed closed-ended funds such as investment trusts or REITs, can be an ideal vehicle for Mansion House less liquid assets**

**Link** [**https://ifamagazine.com/aic-urges-government-to-correct-exclusion-of-investment-companies-from-pension-schemes-bill/**](https://ifamagazine.com/aic-urges-government-to-correct-exclusion-of-investment-companies-from-pension-schemes-bill/)

**Date: 27 July 2025**

**Sections: Investment Trusts + ESG/Sustainable investing**

1. **ROS WARNS AGAINST RAISING STATE PENSION AGE: Ros is quoted in the Daily Mail, warning that increasing the State Pension Age to 74, as suggested by the IFS, would be disastrous for millions of less well-off, less healthy older people**

**Link: https://www.pressreader.com/uk/daily-mail/20250722/281509347224287**

**Date: 22 July 2025**

**Sections: Rethinking Retirement + Pension Reform**

1. **Title: ROS TELEGRAPH ARTICLE – DON’T KEEP RAISING STATE PENSION AGE: Ros wrote a Comment article for the Daily Telegraph, explaining why it is so wrong to just keep raising state pension age as a money-saving exercise, due to large differentials in health and wealth among older people – need more flexibility not more punishment for the poorest**

**Link: https://www.telegraph.co.uk/news/2025/07/22/labour-state-pension-age-review-increases/**

**Date: 22 July 2025**

**Sections: Latest Publications + Pension Reform**

1. **Title: WILL CHANCELLOR RAID PENSIONS TAX BREAKS SOON?: Ros was interviewed on GBNews explaining why the Chancellor may be tempted to cut pension tax relief and that pension funds investing more of the £70billion in the UK would help justify this huge spending**

**Link:** [**https://www.msn.com/en-gb/money/other/pension-warning-as-tax-breaks-could-be-targeted-in-autumn-budget-unless-uk-investment-rises/ar-AA1HnxlW?ocid=oa-TLW&apiversion=v2&noservercache=1&domshim=1&renderwebcomponents=1&wcseo=1&batchservertelemetry=1&noservertelemetry=1**](https://www.msn.com/en-gb/money/other/pension-warning-as-tax-breaks-could-be-targeted-in-autumn-budget-unless-uk-investment-rises/ar-AA1HnxlW?ocid=oa-TLW&apiversion=v2&noservercache=1&domshim=1&renderwebcomponents=1&wcseo=1&batchservertelemetry=1&noservertelemetry=1)

**Date: 20 June 2025**

**Sections: Ros on the Web + Pension Reform**

1. **AS MORE PENSIONERS OWE TAX COST OF ADMINISTERING COLLECTION COULD OUTWEIGH EXTRA REVENUE: Ros is quoted in the Daily Express warning that the frozen tax thresholds will tip more pensioners over the £12,570 tax threshold, but collecting those tiny amounts of tax could cost more than the revenue raised**

**Link: https://www.express.co.uk/news/politics/2078182/pensions-keir-starmer-labour**

**Date: 6 July 2025**

**Sections: Pension Reform**

1. **Title: MAKING MORE PENSIONERS OWE TAX FEELS LIKE AN INSULT TO THEM: Ros warns that the cost of administering tax collections for millions more pensioners could outweigh the tiny sums of tax they owe**

**Link** [**https://www.pressreader.com/uk/daily-express/20250707/281479282421942**](https://www.pressreader.com/uk/daily-express/20250707/281479282421942)

**Date: 6 July 2025**

**Sections: Pension Reform**

1. **Title: STATE PENSION AGE RISES ARE UNFAIR: Ros wrote a Daily Telegraph Comment article explaining why it is socially inequitable to keep increasing State Pension – there are better ways to save money on pensions**

**Link https://www.telegraph.co.uk/news/2025/07/22/labour-state-pension-age-review-increases/**

**Date: 22 July 2025**

**Sections: Latest Publications + Pension Reform**

1. **Title: USE TAX RELIEF TO INCENTIVISE MANSION HOUSE REFORMS: Ros is quoted by Pensions Expert, calling for the Government to restrict tax relief if pension funds do not meet Mansion House commitments to invest in UK growth assets**

**Link: https://www.pensions-expert.com/investment/mansion-house-putting-the-trust-back-into-trusteeship/69451.article**

**Date: 4 June 2025**

**Sections: Pension Reform**

1. **Title: BABY BOOMERS ARE THE BACKBONE OF THE MIDDLE CLASSES: Ros wrote a Comment article for the Daily Telegraph explaining that the Government should not be picking on older citizens – who are the backbone of Britain’s middle classes**

**Link https://www.telegraph.co.uk/news/2025/06/06/why-baby-boomers-are-the-backbone-of-middle-class-britain/**

**Date: 6 June 2025**

**Sections: Latest Publications**

1. **NEW WINTER FUEL PAYMENT MEANS-TEST WILL CREATE DIFFICULTIES: The Daily Telegraph quotes Ros commenting on the latest Government u-turn which sees a new much more generous means-test for pensioner Winter Fuel Payments – but there will be significant complexities for some people and the cut-off may be confusing**

**Link https://www.telegraph.co.uk/politics/2025/06/09/winter-fuel-quarter-pensioners-payments-rachel-reeves/**

**Date: 9 June 2025**

**Sections: Campaigns**

1. **Title: 9 MILLION MORE PENSIONERS WILL GET WINTER FUEL PAYMENTS: Ros is quoted by The Daily Express welcoming the Government u-turn on pensioner Winter Fuel Payments, which will mean millions more pensioners will have extra money this Winter**

**Link: https://www.express.co.uk/news/politics/2066438/nine-million-pensioners-receive-winter**

**Date: 9 June 2025**

**Sections: Pension Reform + Campaigns**

1. **Title: WILL PENSION FREEDOMS DIES BEFORE THEY DELIVER: Ros wrote a Comment article for Money Marketing explaining her concerns that the imposition of IHT on unused pensions will kill pension freedoms and ultimately leave most DC schemes empty in later life**

**Link: https://www.moneymarketing.co.uk/opinion/ros-altmann-will-pension-freedoms-die-before-they-deliver/**

**Date: 18 June 2025**

**Sections: Latest Publications + Pension Reform**

1. **Title: GOVERNMENT HAS A RIGHT TO ASK PENSION FUNDS TO INVEST AT LEAST A QUARTER OF CONTRIBUTIONS INTO UK GROWTH ASSETS: Ros is quoted in Professional Pensions, explaining her ideas to revive UK growth by harnessing the power of pension contributions to benefit our own markets, companies and infrastructure, just as other countries’ pension funds do. We are global outliers**

**Linkhttps://www.professionalpensions.com/news/4515355/ros-altmann-taxpayer-subsidies-uk-schemes-unless-britain**

**Date: 24 June 2025**

**Sections: Ros on the Web + Pension Fund Asset Allocation**

1. Title: **ROS CALLS FOR PENSION FUNDS TO INVEST IN BRITAIN: Pension Age quotes Ros’ call for the Government to ask UK pension funds to invest at least 25% of their new contributions into UK growth assets as a quid pro quo for the £70bn a year tax relief they receive and currently spend mostly helping overseas markets**

**Link: https://www.pensionsage.com/pa/Govt-urged-to-require-funds-to-invest-25-of-new-contributions-in-UK-growth-in-exchange-for-tax-relief.php**

**Date: 24 June 2025**

**Sections: Pension Fund Asset Allocation**

1. **Title: GBNEWS INTERVIEW WHERE ROS WARNS PENSION TAX BREAKS ARE UNDER THREAT: Ros was interviewed by GBNews, explaining why people should be concerned that the current £70bn spent on pension tax reliefs each year is at risk, especially as UK pension funds shun UK growth assets!**

**Link: https://www.gbnews.com/money/pension-tax-breaks-autumn-budget-uk-investment-rises**

**Date: 25 June 2025**

**Sections: Ros on the Web + Fiscal/Monetary policy**

1. **Title: COULD PENSION IHT CHANGES ENCOURAGE TERMINALLY ILL PEOPLE TO WANT TO END THEIR LIVES BEFORE THE AGE 75 CUT-OFF: inews quotes Ros expressing concerns that keeping the Age 75 cut-off, while imposing draconian IHT and income tax on inherited unused pensions, could combine with the Assisted Dying legislation, if passed, to influence some terminally ill people.**

**Link: https://www.msn.com/en-in/news/world/pension-tax-trap-could-pressure-elderly-into-assisted-dying-experts-warn/ar-AA1HtR4K**

**Date: 27 June 2025**

**Sections: Pension Reform**

1. **Title: MONEYMAGPIE PODCAST WITH ROS EXPLAINING WHY PENSION FUNDS SHOULD INVEST MORE IN BRITAIN: Ros is interviewed by MoneyMagpie, explaining the risks of pension funds failing to support UK companies and markets**

**Link: https://www.youtube.com/watch?v=qwbXUP\_ijhk**

**Date: 28 June 2025**

**Sections: Ros on the Web**

1. **Title: LOW EARNERS LOSING OUT BY DELAYS TO IMPLEMENTING A/E REFORMS: Ros explains that the failure to include younger workers and those earning under £10,000 a year from auto-enrolment, and starting at pound zero, means many low earners lose out**

**Link: https://www.lancs.live/news/cost-of-living/pension-reform-delays-rachel-reeves-32196154**

**Date: 4 August 2025**

**Sections: Pension Reform**

1. **Title: STATE PENSION AGE OF 80 IS UNTHINKABLE: Ros is quoted by the Daily Express commenting on the unfairness of suggestions that the State Pension Age should be raised to anything like age 80, when so many less well-off people would never receive a penny, despite a lifetime of National Insurance contributions**

**Link** [**https://www.express.co.uk/news/politics/2091518/state-pension-age-80-fury**](https://www.express.co.uk/news/politics/2091518/state-pension-age-80-fury)

**Date: 5 August 2025**

**Sections: Campaigns + Pension Reform**

1. **Title: MANY POOR PENSIONERS LOSE OUT DUE TO THEIR EMERGENCY SAVINGS: Ros comments to Birmingham Live explaining that the problems of means-test threshold cut-off and rising interest rates may lock some poor pensioners out of Pension Credit help**

**Link: https://www.birminghammail.co.uk/news/midlands-news/state-pensioners-face-losing-dwp-32194274**

**Date: 4 August 2025**

**Sections: Pension Reform**

1. **Title: ASSURA REIT UNDER THREAT FROM OVERSEAS PRIVATE EQUITY – CRITICAL NHS INFRASTRUCTURE MAY BE AT RISK: Ros wrote an article for The Times newspaper, explaining why it is so important that the takeover of Assura REIT does not allow foreign owners to benefit from the disarray in our investment trust valuations, and we lose some critical NHS infrastructure**

**Link: https://www.thetimes.com/business-money/companies/article/ex-minister-seeks-to-protect-nhs-against-foreign-ownership-sp0xvd7qk**

**Date: 26 April 2025**

**Sections: Latest Publications + Investment Trusts**

1. **Title: STATE PENSION AGE FOR MEN AND WOMEN SHOULD BE EQUAL: Ros is quoted in the ‘i’ newspaper explaining why she supports equal state pension ages for men and women**

**Link: https://inews.co.uk/news/science/why-women-men-retire-same-age-science-3775909**

**Date: 29 June 2025**

**Sections: Rethinking Retirement**

1. **Title: INVESTMENT TRUSTS UNDER ATTACK IN NEW PENSION SCHEMES BILL: Ros is quoted by Citywire calling on the Government to recognise that banning the use of investment trusts for Mansion House UK investing in private assets is unacceptable – they are ideal vehicles for long-term investments in illiquid assets like small start-ups and infrastructure, renewable energy etc.**

**Link: https://citywire.com/investment-trust-insider/news/aic-demands-u-turn-on-unjust-trust-exclusion-from-pension-bill/a2471013**

**Date: 29 July 2025**

**Sections: Investment Trusts**

1. **Title: IF KEEPING TRIPLE LOCK MEANS RAISING SPA TO 74, IT MUST GO: Ros wrote a Comment article for inews explaining that increasing state pension age to 74, in order to pay for keeping the triple lock, would be disastrous for poorer pensioners and those in poor health, who will never be helped by the triple lock if they die young**

**Link: https://inews.co.uk/opinion/if-keeping-triple-lock-means-retiring-74-3783105**

**Date: 2 July 2025**

**Sections: Latest Publications + Pension Reform**

1. **Title: TRIPLE LOCK NEEDS ADJUSTING – IT HAS OUTLIVED ITS USE: Ros is quoted by the Financial Times newspaper, saying that the triple lock should be rethought, as it has done its job and been kept in place too long to be a useful policy tool**

**Link: https://www.ft.com/content/5ec597a9-1063-4323-9ef3-c2925492c1ad**

**Date: 2 July 2025**

**Sections: Pension Reform**