SQUIRE PATTON BOGGS

Kate Bailey

Partner

Birmingham
T +44 121 222 3366

kate.bailey@squirepb.com



About Kate

Kate Bailey has a wealth of experience advising on all aspects of occupational pension plan management, including governance, legislative compliance, benefit change projects, liability management projects, mergers and buy-ins/buyouts. She is a well-regarded lawyer within the pensions industry, known for her clarity of advice as well as her level-headedness and commercial sense. Clients also appreciate her down-to-earth approach to collaborating with peers to find effective solutions.

Kate is listed in *Legal 500* as a Next Generation Partner, for the significant recognition received from clients and peers in the pensions industry. Kate has also been shortlisted for multiple awards including Lawyer of the Year at the Professional Pensions Rising Star Awards 2023, the Most Inspiring Returner award at the Women in Pensions Awards 2021, and the Future Face of Legal in the Chamber of Commerce Awards 2019. Kate is a trustee director of the Midlands Air Ambulance Charity and a director of the Colmore Business Improvement District.

Kate is passionate about increasing social mobility and gender diversity at senior leadership level – she has mentored associates to support them in their career progression and leads on initiatives to promote change, from client-facing events discussing International Women's Day themes and topics such as unconscious bias, to hosting social mobility programmes aimed at encouraging young people into the legal profession. Drawing on her own experience, Kate also actively engages with parental leave returners, to support them in their return to work and career aspirations.

Experience

- Advising the trustee of a large logistics sector scheme in relation to a split of the business into two corporate groups, including extensive negotiations on, and drafting of, mitigation and a flexible apportionment arrangement.
- Advising a listed company in relation to a £2 billion sectionalised triple scheme merger, including project management, drafting all merger documentation and liaising with four sets of lawyers.
- Advising clients on their single code of practice compliance projects, including drafting of policy documents and driving efficiencies within trustee boards.
- Drafting a new definitive deed and rules for a hybrid scheme with multiple benefit categories.
- Advising trustee boards on the transfer of defined contribution benefits to master trust arrangements.
- Implementation of several liability management proposals, including level pension options, enhanced transfer value offers and flexible retirement options.
- Advising trustees on and negotiating the terms of adviser agreements, in particular a heavily negotiated administration agreement.

Credentials

Education

- Nottingham Law School, Legal Practice Course, 2008
- Nottingham Trent University, Diploma in Professional Practice, Distinction, 2006
- Nottingham Trent University, LL.B., First Class Honours, 2006

Admissions

- England and Wales, 2010

Memberships & Affiliations

- Member of the Association of Pension Lawyers
- Affiliate member of the Association of Governance Practitioners

Recognitions

- Recognised by *Legal 500* as a Next Generation Partner – Pensions
- Richard Alderson Achievement Award 2008 for the highest mark on the LPC in her trainee intake

Expertise

Services

- Pensions

About our firm

One of the world's strongest integrated law firms, providing insight at the point where law, business and government meet. We deliver commercially focused business solutions by combining our legal, lobbying and political capabilities and invaluable connections on the ground to a diverse mix of clients, from long-established leading corporations to emerging businesses, startup visionaries and sovereign nations. More than 1,500 lawyers in over 40 offices across four continents provide unrivaled access to expertise.