



ASSOCIATION OF PROFESSIONAL PENSION TRUSTEES

PRESS RELEASE

Wheeler and Yates take helm at APPT as role grows

12 October 2026: The Association of Professional Pension Trustees (APPT) today announced that Council members, Christopher Wheeler and Julia Yates, are taking the helm as Co-Chairs of the APPT, succeeding Rachel Croft (current Chair) and Vassos Vassou (current Vice Chair) who have both completed their terms in office as Council members.

The move to appointing Co-Chairs takes effect from the Association's AGM on 21 October and is a reflection of the considerable increase in workload faced by a growing Association that has more than doubled in size over the last 5 years or so, as the influence and role of professional trustees has grown.

The APPT membership of accredited professional trustees is now over 460 members and continues to grow following the introduction of its accreditation programme for professional trustees from 2020, and its role as setter of the Standards for accredited professional trustees of occupational schemes and its code of practice for Professional Corporate Sole Trustees (PCST).

The Association has also advanced its representation role and, for instance, meets regularly with TPR and DWP over and above making consultation responses and is an active member of the Joint Industry Pensions Forum.

Commenting on his Co-Chair role, Christopher Wheeler (see profile below) said:

"Julia and I are delighted to be taking on the Co-Chair roles at such an important time for the professional trustee community. Over the next two years, we want to build on the strong foundations established by the APPT and further strengthen the voice, reputation and influence of the profession."

"Our focus will be on maintaining and raising the highest standards of professional trusteeship, while ensuring that the APPT is an authoritative and constructive voice with regulators, government, sponsoring employers and the wider pensions industry. We also want to demonstrate clearly the value that professional trustees can bring to effective governance and better outcomes for schemes and their members."

"We look forward to working closely with APPT members and the many stakeholders across the pensions industry to help shape the future development of the profession."

Co-Chair, Julia Yates (see profile below) added:

"Professional trustees have an increasingly important role to play in supporting strong governance and helping schemes navigate a rapidly changing pensions environment. Over the next two years, we want to ensure that the APPT continues to support its members in meeting that responsibility and that the profession remains at the forefront of the changing needs of schemes and their members."

"We will focus on continuing to develop the skills, standards and professionalism of our members as well as encouraging those with diverse experience and strengths to join the profession. We also want to strengthen engagement with the wider pensions community and ensure that the APPT continues to provide a clear and constructive perspective on the issues affecting trustees and pension schemes."

Rachel Croft, outgoing Chair of the APPT, said:

“The last five years and two-years as Chair have flown by, and I found them an exciting and exhilarating time for professional trustees when our vital role in protecting scheme members’ pensions and leading on governance matters has grown.

“Government has continued to examine our sector and, alongside TPR, the role trustees and our members play in securing and enhancing members’ benefits and that will no doubt continue to be the case as we await the publication of the DWP response to the Trusteeship and Governance consultation and longer-term reforms that may flow from the Pensions Commission.”

At the APPT’s forthcoming AGM two new members – **Amanda Banister** (Dalriada) and **Kate Hardingham** (IGG) are joining the Council, which is otherwise made up of **Tova Docherty** (Capital Cranfield), **Kim Nash** (Zedra), **Sarah Marshall** (Pi Partners), **James Rickards** (Law Deb), **Christopher Wheeler** (BESTrustees) and **Julia Yates** (Vidett).

For further information please contact:

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Notes to editors:

Co-Chair profiles:

Christopher Wheeler is an accredited professional pension trustee and experienced Scheme Chair, with more than 15 years’ trusteeship experience and a 30-year executive career spanning international banking, finance, human resources, mergers and acquisitions, risk and governance.

Christopher has been a Professional Trustee with BESTrustees Limited since 2016 and has extensive experience of Defined Benefit, Defined Contribution, hybrid and insured pension arrangements in the UK and internationally. He currently chairs a number of UK pension schemes, with experience spanning schemes with assets of up to £12 billion and membership of up to 170,000. His expertise includes governance, funding and investment strategy, endgame planning, insurer transactions, surplus management and member experience.

Julia Yates is an accredited professional pension trustee at Vidett, acting as chair, co-trustee and as part of sole trustee teams across a range of benefit structures, scheme sizes, funding levels, covenant strengths and journey plans. She is Chair of Vidett’s Trustee Oversight Board and elected to Co-Chair APPT from October 2026.

Julia has over 20 years’ experience in pensions, governance and advisory roles. Prior to becoming a professional trustee in 2019, she led PwC’s covenant practice in the Midlands, advising schemes and sponsors on strategic risk management, covenant and transactions. She enjoys bringing stakeholders together to develop pragmatic long-term strategies that support both member security and sustainable employer growth.

About APPT

The Association of Professional Pension Trustees is the representative body for trustees of occupational pension schemes who fall within The Pensions Regulator’s description of professional trustee. APPT acts as the collective voice of the profession. Its 460 accredited members sit on many trustee boards for DB and defined contribution schemes, including DC master trusts. Across DB and DC, APPT members are responsible for managing schemes with assets of more than £1.2 trillion.

The APPT is the largest of the two recognised accreditation bodies for professional trustees, responsible for promoting and maintaining high standards amongst practitioners. Every year, members have to renew their accreditation, confirming they are working to the standards required and evidencing they have pursued their professional development over the preceding 12-months.

Association of Professional Pension Trustees

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Registered in England and Wales as a company limited by guarantee

Registered number 08203400