

## **Name and Designation**

Jonathan Mort  
Director, Jonathan Mort Inc, Pension Fund Attorneys

## **Work Experience**

Previously a director of attorneys Fairbridge Arderne & Lawton Inc in Cape Town from 1987 to 2002. He left that firm to take up the position as director of Edward Nathan (Proprietary) Limited in the Employee Benefits Department and became Head of the Retirement Fund Specialised Services Department at Edward Nathan Sonnenbergs Inc (ENS). He left ENS on 28 February 2009 to establish Jonathan Mort Inc, a firm of attorneys specialising in pension fund work on 2 March 2009. He remains a consultant to ENS in pension fund legal issues.

Jonathan has extensive experience in the law affecting retirement funds. His practice covers all aspects of the law relating to retirement funds and includes benefit design, opinion work, the management of complaints, compliance and regulatory work, and acting as an independent trustee for funds exempted from having member elected trustees. He has a particular interest in the governance of retirement funds, and was the primary drafter of the recently published PF 130, the Circular published by the SA Regulator, the Registrar of Pension Funds, on Best Practice in the Governance of Pension Funds. He also acts as an independent trustee having sat on the boards of more than 20 retirement funds; and last year was appointed by the Registrar to chair the board of the Private Security Sector Provident Fund, a large fund which had achieved notoriety for being the worst fund in South Africa.

## **Achievements and Relevant Affiliations**

- He is a past President of the South African Pension Lawyers Association
- Currently serving third term as a steering committee member of the International Pension and Employee Benefits Lawyers Association (IPEBLA).
- He is a member of the Actuarial Society of South Africa (ASSA) Professional Conduct Committee.
- He has served on 16 special ad hoc Tribunals constituted by the Registrar to apportion surplus.
- He is on the Advisory Committee of the South African Pension Fund Investment Forum (a branch of the European Pension Fund Investment Forum).
- He is a member of the Financial Services Board Enforcement Committee (a quasi judicial body established by the Registrar to enforce compliance and impose sanctions for non compliance in the financial services industry).
- He has presented papers, taken part in numerous industry conferences locally and internationally, given talks on national radio and been quoted in the national press on matters relating to pensions law.
- He is the directing editor of IPEBLA's "Comparative Survey of Pension Law Issues", published in May 2009 and covering 16 different major legal jurisdictions around the world.