



Programme

12 May

Dinner

7.30 for 8pm, dress code is smart casual

13 May

09.30-10.00

Arrival and refreshments

10.00-10.10

Welcome from Eddie Grant, Member Director of the Board

10.10-10.25

Fay Goddard, Chief Executive, The Personal Finance Society

Fay will run through the PFS Business Plan for the year ahead

10.25-11.00

Martin Wells, Head of PFS Operations – Guidelines and Communications

This session will explore the Head Office and Regions relationships, including the new communications process and revised regional committee guidelines

11.00-11.20

Eddie Grant – New Regional KPI Pack

Eddie will introduce the new regional KPI pack designed to support you and your regions

11.20-11.50

Questions and Answers panel session

Address your questions to Fay; Martin; Eddie; Paul Lothian, PFS President and David Irvine, CII AMM

11.50-12.05

Refreshment break

12.05-12.15

Mark Hutchinson, Head of PFS Marketing

Update from Mark on marketing, press and PR

12.15-12.30

Hal Austin, Editor, Financial Adviser

How to deal with the Press

12.30-13.00

Fay Goddard – RDR & Qualifications

Update on the RDR, proposed new qualification and progress to date

13.00-13.30

Caspar Bartington, CII Relationship Manager, Higher & Further Education

The next generation, work underway within higher and further education

13.30-14.30

Lunch

14.30-15.20

Breakout sessions

Chairmen

Facilitated by Paul and Martin

The objective is to discuss the role of Chairman, identify ways of delivering PFS strategy including increased regional activity, attendance, raising the PFS profile through initiatives within the local community and media

Education Officers

Facilitated by Fay and Mark

The objective is to ensure understanding of current and future exam requirements, credits & CII/PFS support; to identify ways of increasing access to and attendance at training events & study groups; how to encourage members to progress to higher qualifications; delivering educational communications

Area Liaison Officers

Facilitated by Eddie and David

The objective is to understand the revised ALO Role; identify ways of building closer relationships with Local Institutes; maximising the oversight role e.g. meetings and study groups; producing ideas for Chartered Events and how to develop the Chartered Connections concept

15.20-15.35

Refreshment break

15.35-16.10

Eddie Grant – feedback session

Action Plan presentations from each breakout session

16.10-16.20

Q&A

Eddie Grant will answer final questions

16.20-16.30

Close

Paul Lothian will close the day