



## 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*