

3. Develop a close association with the professional body

Benefit	Member Value	Student	Qualified	Chartered
Membership card and membership certificate to proudly display your membership status	Member exclusive	✓	✓	✓ Chartered branded
Belong to a body guided by the Professional Standards Board on setting standards for the achievement of excellence	Member representation	✓	✓	✓
Online support tools helping you effectively plan your programme of development including an online CPD scheme	Member exclusive	n/a	✓	✓
Underpin your credibility with a respected Code of Ethics and Conduct	Member exclusive	✓	✓	✓
Networking opportunities with like minded individuals through local Regions who can offer mentoring, support and guidance	Member exclusive	✓	✓	✓
Belong to a professional body which takes an active role with the government, regulator and the media representing your interests	Member representation	✓	✓	✓
Consumer website and find an adviser search facility	Member exclusive	✗	✓	✓
Branded merchandise to display your status to your clients	Member exclusive - charged at cost	✗	✗	✓
"Dealing with a professional" leaflet for use with your clients	Member exclusive	✗	✓	✓ Chartered branded
Annual Chartered Financial Planner gala dinner and awards night	Member exclusive	✗	✗	✓
The opportunity to graduate alongside your peers in recognition of your achievement through our Graduation Ceremony	Complimentary for members	✗	✓ Dip PFS & above	✓
Invitation to attend focus groups on key topics affecting the profession	Member exclusive	✗	✓	✓
Direct access to a barrister (without having to instruct a solicitor)	Member exclusive	✗	✓ APFS & FPFS only	✓
Access to the Partner Discount Scheme – a range of benefits to support your lifestyle and your business	Member exclusive	✓	✓	✓

Membership makes all the difference



Leading you out in front

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The Personal Finance Society 

Membership makes all the difference

The Personal Finance Society is the leading professional body for financial advisers and those in related roles in the UK. With over 23,000 members, it promotes the highest standards of professionalism.

Membership of the PFS gives you access to everything you need to plan and develop your career in financial services. From entry level to advanced, or put another way, from first job to being the boss, the PFS enables you to plan your way to the top - and help you to stay there.

1. Supports your knowledge and self-development

From the Financial Solutions magazine and your own copy of the Knowledgepack book to regular emails covering technical and regulatory news and updates, you will receive all you need to keep you in the know. You will also have access to a complete package of industry intelligence available through an online resource centre.

2. Creates a career advantage through qualifications and designatory letters

From entry level through to professional level qualifications and Chartered status, you can give your career a competitive edge. Members receive generous discounts on exams, study support material and revision courses. Once qualified, members can use designatory letters helping you to demonstrate your professionalism to your clients on your business stationery.

3. Develop a close association with the professional body

The PFS plays an increasingly important role with the government, the regulator and the media. We give voice to our members to ensure their concerns are on the agenda of those who shape markets and influence opinion. As a member, you are able to underpin your credibility by following the Code of Ethics and Conduct, demonstrating your commitment to acting with integrity, honesty and professionalism. You will be able to network with your peers through regular meetings, seminars and conferences.

At a glance guide to PFS membership benefits

1. Supports your knowledge and self-development

Benefit	Member Value	Student	Qualified	Chartered
Training courses to enhance your knowledge quickly	Typical discount of 15%	✓	✓	✓
Regular technical and regulatory update emails to keep you in touch and up to date	Member exclusive	✗	✓	✓
The leading market magazine, Financial Solutions, which will develop your knowledge and keep you abreast of market changes. Six issues a year	Complimentary to members – worth £30 a year	✓	✓	✓
Professional development programme of regional meetings and seminars to improve your knowledge and skills	Attendance at regional meetings is free for members - £60 for non-members. 50% discount off the price of Technical seminars	✓	✓	✓
The annual 2 day PFS Conference	Member exclusive - members save £100s compared with commercial conferences	✓	✓	✓
Free subscription to Citywire Professional giving complete access to Citywire.co.uk, the website most widely used by top financial advisers (source: PIMS research June 2007) providing you also take out a free subscription to New Model Adviser.	Complimentary web subscription worth £399	✗	✗	✓
Online access to knowledge services to support your development (www.cii.co.uk/knowledge)	Member exclusive	✓	✓	✓
A source of industry facts and figures, Knowledgepack will provide you with useful technical and market information	Member exclusive	✓	✓	✓
Online access to a career support centre (www.cii.co.uk/careersupport) to help you plan your career	Member exclusive	✓	✓	✓
Access to one of the largest financial services libraries in the world	Member exclusive	✓	✓	✓
Benefit from access to high quality TV style presentations, interviews and investment information direct from your PC or laptop through Asset TV	Member exclusive	✗	✓	✓
Enhance your membership through the PFS faculties	Member exclusive	✗	✓ Dip PFS & above	✓
Key fact guides on technical subjects to keep your knowledge up to date	£20 - member exclusive	✗	✓	✓

2. Creates a career advantage through qualifications and designatory letters

Benefit	Member Value	Student	Qualified	Chartered
Entry level through to professional level qualifications to help give your career a competitive edge	Typical discount of 20%	✓	✓	✓
Learning materials, study and revision days to support your studies	Member discounts	✓	✓	✓
Access to examination-related learning and revision materials and an online resource centre (www.cii.co.uk/knowledge)	Member exclusive	✓	✓	✓
Designatory letters available helping you to demonstrate your professionalism to your clients on your business stationery	Member exclusive	n/a	✓	✓
Chartered Financial Planner status is available to members at the highest level of academic attainment and professional achievement.	Member exclusive	n/a	n/a	✓