Personal Finance Society

Regional Committee Guidelines

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Contents

Regional Committee Guidelines

This guide provides notes for Personal Finance Society Regional Committees.

It lists responsibilities for both Personal Finance Society Central Office and elected Personal Finance Society Regional Officers.

It sets out operational procedures that apply from Personal Finance Society Regional Annual General Meetings to Personal Finance Society Regional Conferences.

The Personal Finance Society is the leading professional body for the UK financial planning profession.

Our mission is to lead the financial planning community towards higher levels of professionalism, exhibited through ethical and behavioural standards, skill and technical knowledge to the ultimate benefit of the profession and the consumer alike.

The Personal Finance Society is a not-for-profit organisation with member-led governance. We are active and highly influential in driving the professionalism agenda on behalf of over 38,000 members.

Contact us

If you have any queries regarding the information in this brochure, please contact your dedicated Regional Development Executive (RDE).

The PFS is committed to delivering a first-class service and, to this end, we welcome feedback on any aspect of your relationship with our organisation.

Please forward any views you may have on the service you receive.

We take all such comments seriously and use them to help ensure that we continually improve the service we provide.

Regional Development Executives

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Overview

The Personal Finance Society regional structure

England, Scotland, Wales and Northern Ireland are divided geographically into 26 PFS regions. All PFS members are allocated to a region. Most members select the region in which they live or work and the default region is based on the member's residential postcode (appendix 1.1 & 1.2), but this can be changed upon request.

The purpose of the regional structure is to ensure that all PFS members have the opportunity to obtain maximum value from their membership through regional events and activities; to help drive, develop and promote the Society and its objectives and to benefit from the social and networking opportunities. The regional structure is a key conduit through which the PFS delivers its strategy.

Each of the PFS regions has its own committee and these are essential in maintaining the future growth and professional standing of the Society. The committees are made up of member elected volunteers with the objective of supporting the Society in achieving its objectives, which include:

- Delivery of quarterly regional conferences
- Widening awareness of the Society and its mission within the community
- Organising training and educational events for members
- Facilitating the development of interpersonal and business skills and technical knowledge
- Supporting and encouraging professional development and higher qualifications
- Supporting and encouraging member engagement with community/pro-bono initiatives
- Advocating membership of the Society
- Ensuring awareness of and adherence to the PFS/CII Code of Ethics and Conduct
- Providing social and networking opportunities
- Building closer relationships and interacting with the CII Local Insurance Institutes.

PFS Mission Statement

To lead the financial advice community towards higher levels of professionalism

How do we achieve this goal?	Through a wide programme of activities, including advocacy, guidance, publications, related tools, training and educational events.
What do we mean by 'higher levels of professionalism'?	Exhibited through ethical and behavioural standards, interpersonal and business skills and technical knowledge.
Who benefits from our success?	The profession and consumer alike.

Regional committees

Personal Finance Society regional committee roles

There are six official regional committee positions to which members can seek to be elected. Each region can have as many members in role as they deem necessary and can flex the role responsibilities to suit the specific needs of their region.

Full role descriptions can be found from page 9 onwards of this document.

1. **Regional Chair** – A one-year post with overall responsibility for co-ordinating regional communications and activities. Chairs can be re-elected on an annual basis to a maximum of three years; this can be extended at the discretion of the committee if there is no successor.
2. **Professional Qualifications Officer** – A one-year post focused on maximising the development, training and competency of members. The post-holder will need to be familiar with CII study, tutorial and examination facilities and will advocate professional development. Professional Qualifications Officers can be re-elected on an annual basis to a maximum of three years.
3. **Membership Officer** – A one-year post focused on encouraging greater member participation in regional conferences and activities, together with the recruitment of new members and retention of existing ones. Membership officers can be re-elected on an annual basis to a maximum of three years.
4. **New Professional's Officer** - The New Professional's Officer will focus on activities that support and raise awareness of the Personal Finance Society proposition to members new to the profession (approx. sub 10 years).
5. **Education Outreach Ambassador** - The Education Outreach Ambassador will be responsible for promoting and helping to drive local member engagement with the Education Champions, as part of the pro bono initiative which aims to deliver financial awareness sessions in schools opening this conversation with Discover Fortunes. The post-holder will support local participating members of the programme ('Education Champions') and work closely with the CII Relationship Manager - Education.
6. **Chartered Champion** – A one-year post focused on promoting Chartered status and the 'Road to Chartered', as well as building professional relationships to put on and host educational events for Chartered members in your region. Chartered Champions can be re-elected on an annual basis to a maximum of three years.

Other committee positions

Vice Chair – An additional title that can be given to a committee member, usually in preparation as they look to succeed the current Chair or following stepping down from the role of Chair. This title would generally be used in tandem with a current elected role. Vice Chair can be re-elected on an annual basis.

Local Institute Liaison Officer - An additional title, available to all elected committee member(s) and nominated by the Chair, to be the main point of contact with a Local Institute (LI). For those regions with more than one LI, one Liaison Officer should be nominated per LI.

Committee Support Officer – A regional committee can comprise as many members as the Chair deems appropriate.

Regional committees can designate other roles to committee members to assist the elected officers, for example a committee secretary, but these are not member elected positions. Where such roles are designated, they will be referred to as Committee Support Officers. Any unofficial committee positions require the Chair's approval and should be supported by a majority vote among committee members. Central Office should be notified of any Committee Support Officers so that records can be maintained and badges provided. All committee members must be full Personal Finance Society members and support the Personal Finance Society Objectives and Mission Statement.

All and any new committee members should be either employed or self-employed in a role directly and exclusively within Financial Services. A concession to this rule is allowed in respect of those who have recently (within 24 months) retired from such a role, and who are no longer working. It should also be noted that committee members who offer support services of a commercial nature must not use their position to target or market their services or products directly to Personal Finance Society members.

Regional committees

Liaison with local institutes

The CII has 56 local institute councils across the country. These councils range from 10 to 20 members and support CPD, social and charitable activities throughout the year. Every Personal Finance Society member is also a member of their local institute.

In order to build closer relationships with Local Institutes the Regional Chair will determine which committee member(s) take responsibility to liaise with their LI(s). Some regions cover more than one LI, therefore liaison will be divided amongst regional committee members. The LI councils are keen to increase the number of activities that support the financial planning community as more of their members are coming from this sector. Please contact your Regional Development Executive (RDE) if you require assistance liaising with your LI.

Regional conferences

The Chair and committee are responsible for hosting quarterly regional conferences assisted and supported by your RDE.

Committee meetings

Regions should hold a minimum of four committee meetings per annum. The meetings should provide an opportunity to discuss committee membership, operational issues, regional performance and new and innovative ways to serve the membership. Committee meetings must be minuted and a copy sent via email to your RDE. These meetings can be held at any time, but ideally before or after the regional conferences to enable cost saving for the committee. Skype meetings are also acceptable alternatives.

Annual officers' conference

Holders of the six official regional committee positions will be invited to attend an annual Officers' Conference (OC) where regional best practice, committee effectiveness and training is provided. The OC is preceded by a Regional Dinner, this provides an excellent opportunity for committee members to network in an informal setting. Attendance includes overnight accommodation; reasonable travel expenses will be met.

Regional AGM

During the Quarter 4 regional conference (i.e. as an agenda item), each Region will hold an Annual General Meeting for the purpose of electing/re-electing official committee members to the committee. Minutes should be taken and a copy sent to daniel.moodliar@thepfs.org so that an accurate record of regional committees and regional roles is maintained.

All paid-up members in attendance at this meeting will be given the opportunity to vote (by a show of hands) for or against each committee nomination. For a nominee to be elected to the committee, a majority vote in favour of their election must be obtained. A count of such votes will be taken and recorded and submitted to the Personal Finance Society Central Office.

To elect/re-elect a member to an official regional committee position, a designated Nomination Form must be used. Each nomination must be proposed and seconded at the AGM and the form signed by each. The form (or a copy) should be sent to Central office for central records. The Chair can co-opt up to two members mid-term to an official position. Any co-opted members must stand for formal election at the following AGM. Student members can be co-opted whilst they are studying and would stand for formal election at the AGM following completion of the benchmark qualification.

The CII/ Personal Finance Society values and respects diversity and strives in all of its activities to take account of and reflect the interests of all the people it serves in line with section 5 of the CII Code of Ethics and particularly with regard to the protected characteristics set out in the Equality Act 2010 (age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion/belief, sex and sexual orientation). It is expressly requested that all committee members respect the legal obligations under the laws of the CII/ Personal Finance Society and acknowledge that the CII/ Personal Finance Society may take action against any member of the CII/ Personal Finance Society or anyone undertaking work of whatever nature on behalf of the CII/ Personal Finance Society, whether paid or unpaid who demonstrates discriminatory behaviour.

Regional committees

Expenses policy

The Personal Finance Society policy is to reimburse all reasonable travelling expenses incurred by elected Regional Officers when travelling to and from any non-regional events or meetings and the Officers' Conference. Expenses for attendance at, or travel to, other Personal Finance Society events such as the Financial Planning Symposiums and specialist regional roadshows cannot be claimed. Please note, this policy will become effective from January 2019.

Mileage is reimbursed at 0.45p per mile. Claims for expenses must be supported with receipts and completion of an expenses claim form (see form at the end of the document). No other expenses i.e. accommodation or subsistence will be met unless previously agreed with the Personal Finance Society Events Director.

Confidentiality

The Personal Finance Society may send elected Committee members confidential or sensitive documents for their information and/or comment (e.g. regional membership statistics). It is therefore the Society's policy that elected officers are asked to sign a Confidentiality Agreement upon the start of tenure in a regional role.

Bank accounts

The Personal Finance Society does not recognise or encourage the use of regional bank accounts. Any accounts held are done so at the discretion of the regional committee which has sole responsibility for maintenance, audit and appropriate use of funds. It is the responsibility of the Regional Chair on taking up office to ensure all signatories on any regional accounts are current.

Regional committee signatures

All regional officers can display their Personal Finance Society regional title and/or Personal Finance Society logo on communications.

(CII group guidelines state that the logo should not be reproduced less than 7mm in height, please visit the Personal Finance Society website for more details.)

Central Office

General support and communications

Central Office will provide support and guidance to the regional committees to help promote and deliver the Society's objectives and will receive and act upon member feedback.

In order for each region to track membership activity, set targets, monitor performance and compare with other regions, Central Office circulate comprehensive information to each regional Chair on a regular basis, including:

- Attendance levels at regional conferences (local and nationwide).
- Consolidated regional conference feedback from delegates.
- Monthly exam entries for your region and surrounding regions.

In addition to the centrally produced general communications, the Personal Finance Society will issue a quarterly Chair's E-Newsletter to be circulated to Personal Finance Society members in a local region which the committee can utilise and include local regional news.

Text for the newsletters must be relevant to Personal Finance Society members and in line with the Personal Finance Society's stated objectives. Content for the newsletter would ideally need to be received 8 weeks before a regional conference so that this can be absorbed into the CII nationwide marketing schedule. Please contact daniel.moodliar@thepfs.org with any queries.

Chartered members

The Personal Finance Society actively encourages all new chartered members to contact their regional Chartered Champion to provide contact details in the information pack they receive when they qualify. Please also remember that the Personal Finance Society quarterly member magazine, Personal Finance Professional, is an alternative communication method which can promote forthcoming activities or be used to relay important regional news. Please contact Michelle Worvell, Editor on 0207 417 4763 or via michelle.worvell@cii.co.uk.

PFS board and executive support

Regional Chairs should communicate directly with their Regional Development Executive (RDE) on any Personal Finance Society related matter that requires their support or intervention. In the unlikely event of any regional dispute which cannot be resolved at local level, the matter will be referred to senior staff at the Personal Finance Society who will act as arbitrator.

Personal Finance Society Regional Conference Event Management

The Personal Finance Society outsources its events management to TFI, who for consistency purposes, may be included in the descriptor 'Central Office' throughout this report. The Regional Conferences are managed on the day by your RDE.

Central Office

Guidelines for the Personal Finance Society Regions and LinkedIn

The important thing with online forums of this nature is that, even with lots of members, you have to work hard at facilitating discussions as only a handful of members are generally proactive. The vast majority of those registered keep an eye on what is going on, but rarely contribute. This type of facilitation can be time consuming and experience tells us that smaller groups can quickly lose impetus and become stagnant. For this reason we do not recommend regions setting up their own LinkedIn forums. However, we do encourage the use of regional communication channels such as Slack, Twitter and Facebook groups. More information on this is available in the relevant process guides.

Regional conferences –Central Office operations

Booking Venue

Central Office will book the venues and may confirm all the arrangements with the Chair. Thereafter contact should be through Martin Wells, Events Director, your **RDE** and/or TFI. Committees who wish to arrange alternative venues should liaise with Central Office as soon as possible.

National Sponsorship

Central Office will provide the national partners centrally and advise the Chair. Due to ongoing relationships with the partners, the committees should not invite organisations to either attend the conferences or provide additional sponsorship.

Programme Format

Central Office will book and confirm speaker arrangements. Committees who have specific requests for personal development sessions should contact Central office or include requests on their feedback forms in the suggested topics section.

After Conference Session

Regional committees can use the time after the formal agenda to hold regionally organised sessions if they so wish, but please confirm this via Central Office, your RDE or TFI.

Publicity

Central Office, in partnership with the regional committee, will be responsible for ensuring that the event is publicised via My PFS and preceding events, Regional Chair's quarterly newsletters, the Personal Finance Society Website and Financial Solutions magazine. This will include regional AGM announcements. Regional committees are reminded to provide Central Office with local news items which might be featured within Financial Solutions magazine.

Delegate Bookings

Central Office will be responsible for taking bookings and ensuring that the Chair has a list of members who are booked on to the event 2 days before. Central Office will liaise with the venue regarding refreshments. All committee members must register as delegates. Central Office do not auto-register anyone.

Presentations

Central Office will provide a PowerPoint presentation or Personal Finance Society update to the Chair prior to the meeting. The PowerPoint presentation will be managed on the day by our AV team.

Post event TFI will circulate a copy of the slide presentations and CPD certificates to all delegates.

Registration

Registration will be managed by your RDE. It is the Committee's responsibility to find an officer or committee member to greet delegates and welcome new members/delegates. Attendance at regional conferences is free for Personal Finance Society members. Non-members are permitted to attend 2 regional conferences and are then required to join the Society in order to attend further events.

Regional Committee Badges

Central Office will supply regional committee badges once roles have been confirmed at the regional AGM and via Regional Committee Nomination Forms. Committee members are encouraged to wear these badges at all Personal Finance Society events.

Regional Feedback

Central Office will supply forms for feedback and analyse feedback providing a consolidated summary to Chairs as part of the regular regional data report. **Feedback is also now being completed via the PFS App.**

Regional Chair

Role and responsibilities

- As an ambassador for the Society the Chair is expected to be up-to-date and knowledgeable on Personal Finance Society activities via the website and through regular communications from Central Office.
- Provide direction and leadership to the regional committee and Personal Finance Society members.
- Be an advocate of the Personal Finance Society.
- Chair and, with the support of the RDE, ensure the smooth running of all quarterly regional conferences.
- Communicate appropriate information to committee members and attendees at regional conferences.
- Feedback comments and suggestions from members to the RDE and/or Director of Events.

Supplementary meetings

The Chair is responsible for overseeing any regional meetings over and above the quarterly programme arranged by any committee member that might include:

- Arranging sponsorship. The amount needs to cover venue, speaker expenses, refreshments, etc. Central Office must be contacted prior to any sponsorship being completed to ensure there is no overlap or conflict.
- Identifying and securing speakers in line with the Society's aims and objectives. Any supplementary meetings must be signed off and approved by the Director of Events prior to marketing of the event.

The Chair should provide Central Office with the supplementary meeting programme and Central Office will be responsible for the marketing of the meetings, which will be sent via the standard communications and the regional newsletter.

On request, Central Office will provide the Chair with feedback forms.

Annual regional AGM

During Quarter 3 regional conferences the Chair will formally inform delegates that their Annual Regional AGM will take place during the Quarter 4 conference. The timing for the meeting will be announced and members will be encouraged to consider applying for prospective committee positions. The Chair is responsible for ensuring that the AGM takes place during the regional conference held in Quarter 4 each year and for overseeing the proceedings. The Chair needs to ensure that everyone attending the AGM is aware that only Personal Finance Society members whose subscriptions are paid up-to-date are entitled to vote, by announcing this fact, as is done at the Personal Finance Society national AGM.

Equal Opportunity & Diversity: The Personal Finance Society is committed to become a more inclusive and diverse body that will strive to address any under-representation of particular groups and promote equal opportunities for progression within the Society. As such Regional Chairs are encouraged to draw applications for regional committee positions from groups who may be under-represented at committee level within the Personal Finance Society, such as the following: Ethnic minorities and people with disabilities.

Please see page 5 in respect of AGM procedures.

Vice Chair

'Vice Chair' should be a title given to a current committee member in preparation to take over as Chair, or who has recently stepped down as Chair, usually in tandem with an elected role. The Vice Chair's role is to deputise and take over the above responsibilities should the Chair be unavailable or require support/guidance.

Regional Chair meeting checklist

Regional Chair meeting checklist

Along with the RDE the Regional Chair is responsible for the smooth running of a regional conference. The following guidelines may be of use.

Before a regional conference:

Personal Finance Society Conference Office will always send an email about the event, attaching the Chair's presentation, an agenda and biographies for the speakers. Other information sent may include slides for the day's sessions, the number of people booked to attend. Have you received all of this information and are you happy with it? If not, please contact your RDE or the Personal Finance Society Conference Office.

Conference Agenda

Have you received your conference agenda and again are you happy with it? Time will be allocated in the agenda for your committee to report on relevant activities in your region. If there are any other updates to give, please allow time for this in the opening slot.

Chair's Presentation

Prior to the conference, take the time to go over the presentation and put it into your own words. Remind yourself that not everyone in the audience has attended a conference before. If you are unsure about any aspect of the presentation please contact your RDE.

The Personal Finance Society Central Office is committed to supplying you with the tools to deliver a quality presentation. Please take time to prepare so that your session is a highlight. Your session will set the tone for the day and be the key opportunity for the Personal Finance Society to communicate its message to new and existing members.

Your confidence and commitment will be self-evident and help ensure our membership will grow over the coming years.

Please speak as if you are a part of the central team as that is how the Regional members will view you.

Committee Attendees

Which Committee members will be present on the day and which roles will they assume? For example, the Membership Officer should meet and greet delegate particularly those with coloured badges. Have you all booked onto the event? Do all of your committee members have their name badges?

During the meeting:

Prior to the start

The RDE will introduce you to any speakers/partners/facilitators you haven't met. Run through their bio with them to pick out some prominent points and topics in respect of their presentation. It is your job to ensure that the meeting runs to time – this would therefore be an ideal time to remind them about the countdown clock the important of sticking to time. The speaker will have been provided with speaker guidelines prior to the conference.

Opening Address

Introduce yourself and advise the members that you are Chair for your region. You are supported by a committee and you may like to introduce them and ask them to stand up so that members can see who they are.

The RDE will inform you if there is any planned fire alarm testing taking place and you can then advise the delegates. Inform delegates where the emergency exits and washroom facilities are located. Ask delegates to switch off mobile telephones.

Welcome the members, check they have all checked in and make special effort to welcome those who are attending their first meeting. First time members are highlighted in yellow on the sign in sheets and are identified by a blue stripe on their badge.

Briefly run through the agenda. It would be an opportunity here to mention and thank the partners and remind the delegates that these meetings provide an opportunity to enhance their business, to network and share thoughts and ideas with colleagues. Please encourage them to complete the feedback via the app or the paper forms, as their views help us plan for the future.

If the speaker runs over for more than five minutes, you need to stop them and advise the audience that they can ask questions at their stand during the break. This is an area of concern for delegates and the Chair will need to be strong with the speaker.

Regional Chair meeting checklist continued

After each Presentation

Come back to the-stage and thank the speaker. Please ensure you stand in the lit area so the delegates can see you. Pick out salient points from their presentation and remind the audience of these points, then thank the speaker again. The Chair should encourage other committee members to act as introducers during the programme for their own development.

Remember not all the delegates will be staying for the entire conference. Please remind delegates that they must check out with the hostess team if leaving the event early.

At the end of the conference

Once again thank the speakers, thank the audience for attending and thank the partners.

Remind the audience of the date of the next meeting and encourage them to bring a colleague and to book via the website **www.thepfs.org**

Send a thank you letter to the speakers if you feel this is appropriate. This is down to personal preference as TFI send a thank you as a matter of course. TFI send out slides and CPD certificates by email post-event to all delegates.

Professional Qualifications Officer (previously Education Officer)

The role of Professional Qualifications Officer is an elected position with a term of 1-year. Professional Qualifications Officer can be re-elected on an annual basis for a maximum of three years. The role is focused on maximizing the development, training and competency of members.

Role and responsibilities

- Promotion of qualification framework – via speaking slot at quarterly conference as well as manning the PFS stand at quarterly conference
- Organisation of additional events and activities in conjunction with neighbouring local regions and institutes
- Promotion of additional local CPD events and revision seminars
- Port of call for local members on queries relating to CPD, training and qualification framework
- Encourage members locally to pursue additional qualifications / develop CPD
- Support (and encourage others to support) the local written examination centres in conjunction with neighbouring local institutes.
- Be aware of any Local Institute events that are available and relevant to Personal Finance Society members.

Key relationships:

- Regional Chair
- Regional Development Executives
- Committee members
- Local Institute Education Officer / CPD Secretaries
- Product Marketing – The Personal Finance Society
- Wider engagement team – The Personal Finance Society.

Membership Officer

The role of Membership Officer is an elected position with a term of one year. Membership Officers can be re-elected on an annual basis for a maximum of three years. This role is focused on engaging with current members to encourage greater member participation in regional conferences and activities, as well as recruiting new members and satisfying current members.

Role and responsibilities

- Promotion of membership proposition via speaking slot at quarterly conference.
- Review attendee list prior to the conference to identify guests and new members
- Engage with guests (blue badges) and non-members (green badges) at quarterly conference primarily via meet and greets during refreshment breaks in order to advocate professional body membership
- Post event follow up with non-members
- Promotion of the Personal Finance Society app
- Organising events locally for new members – possibly social /soft-skill
- Encourage non-members to register for the regional conference programme
- Develop new ways of promoting the benefits of Personal Finance Society membership to non-members
- Seek ways of encouraging attendance at regional conferences including the provision of material for quarterly regional newsletters to be sent via Central Office and social media channels
- Explore ways of promoting and generating wider interest in the Personal Finance Society in the business community via local press, radio, social events.

Key relationships:

- Regional Chair
- Regional Development Executives
- Committee members
- Local Institute Membership Secretaries
- Membership Marketing – The Personal Finance Society
- Engagement Team - The Personal Finance Society
- Local financial planning organisations.

New Professional's Officer

Every PFS committee should elect a New Professional's Officer at its Annual General Meeting to hold office for the ensuing twelve-month period. The New Professional's Officer will focus on raising awareness of the Personal Finance Society proposition to members new to the profession.
As a 'New Professional' you will likely have had less than 10 years' experience in the profession.

Main responsibilities:

- Promotion of Personal Finance Society proposition to new and younger members – via PFS conferences and social media
- Speaking slot at regional conference if applicable
- Organising events locally for young professionals or those new to the industry in conjunction with neighbouring regions and local institutes.

Key relationships:

- Regional Chair / Committee members
- Regional Development Executives
- Local Institute Young Professional Committees
- Relationship Manager – Education

Education Outreach Ambassador

The Education Outreach Ambassador will be responsible for promoting and helping to drive local member engagement with the Education Champions, as part of the pro bono programme which aims to deliver financial awareness sessions in schools. This pro bono programme opens the financial conversation with Discover Fortunes and further resources will become available to support the delivery of financial awareness sessions in schools. They'll support local participating members of the programme ('Education Champions') and work closely with the CII Relationship Manager - Education.

To become an Education Outreach Ambassador, you must first complete a training session in order to use the Discover Fortunes programme collateral.

Main responsibilities:

- Run a series of Discover Fortunes events and financial awareness sessions to local schools (*financial awareness resources to be released in 2019).
- Deliver training, support and encouragement to local Education Champions so they can deliver their own sessions.
- Support the CII Relationship Manager – Education with promotion of future available resources focused on raising financial awareness to local Education Champions.
- Build and maintain relationships with local education institutions.

Key relationships:

- CII Relationship Manager – Education
- Education Champions
- Professional Qualifications Officer / Committee members

Chartered Champion

The role of a Chartered Champion is an elected position with a term of one year. Chartered Champions can be re-elected on an annual basis. The role is focused on promoting Chartered status and the 'Road to Chartered', as well as building professional relationships in your region.

Role and responsibilities

- To be the local Personal Finance Society advocate for Chartered status in their region.
- Promotion of chartered proposition – via Ongoing engagement with chartered members at conferences and speaking slot at quarterly conference.
- To represent the Personal Finance Society and act as host at a variety of events organised centrally specifically for Chartered Financial Planners.
- To arrange Chartered Connections events in association with local professional firms – legal and accountancy firms – for education and networking.
- To be proactive in promoting and raising awareness of the Chartered brand to the public through engagement with local press, radio and local community events.

Proactive Promotion

The Chartered brand is highly valuable as it is recognised and trusted by the public. Chartered Financial Planner is a fairly new addition to the chartered family and the status and benefits need to be promoted to the adviser sector, to other professional firms and consumers. The Chartered Champion will explore and identify ways of promoting and generating wider interest in the Personal Finance Society and Chartered Financial Planners. Examples could be through interaction with the local business community, via local press, radio or social events.

Interaction and communication

The Chartered Champion will have a clear understanding of the Personal Finance Society regional structure and regional guidelines and will work closely with the regional committee, keeping the Regional Chairman, and the Personal Finance Society Central Office fully informed of all Chartered Champion related activity at all times.

Chartered Connections

Chartered Champions will run events to enable Chartered Financial Planners to come together with one or more local firms of professional connections such as solicitors and accountants on a regular basis to discuss topics of mutual interest, aimed at education and forging relations between the groups of professionals. The Chartered Champion will be expected to take a lead in initiating and attending these events and be responsible for liaising with the professional firm, the Personal Finance Society Central Office and for administering the event to ensure its smooth running.

How to run a Chartered Connections event

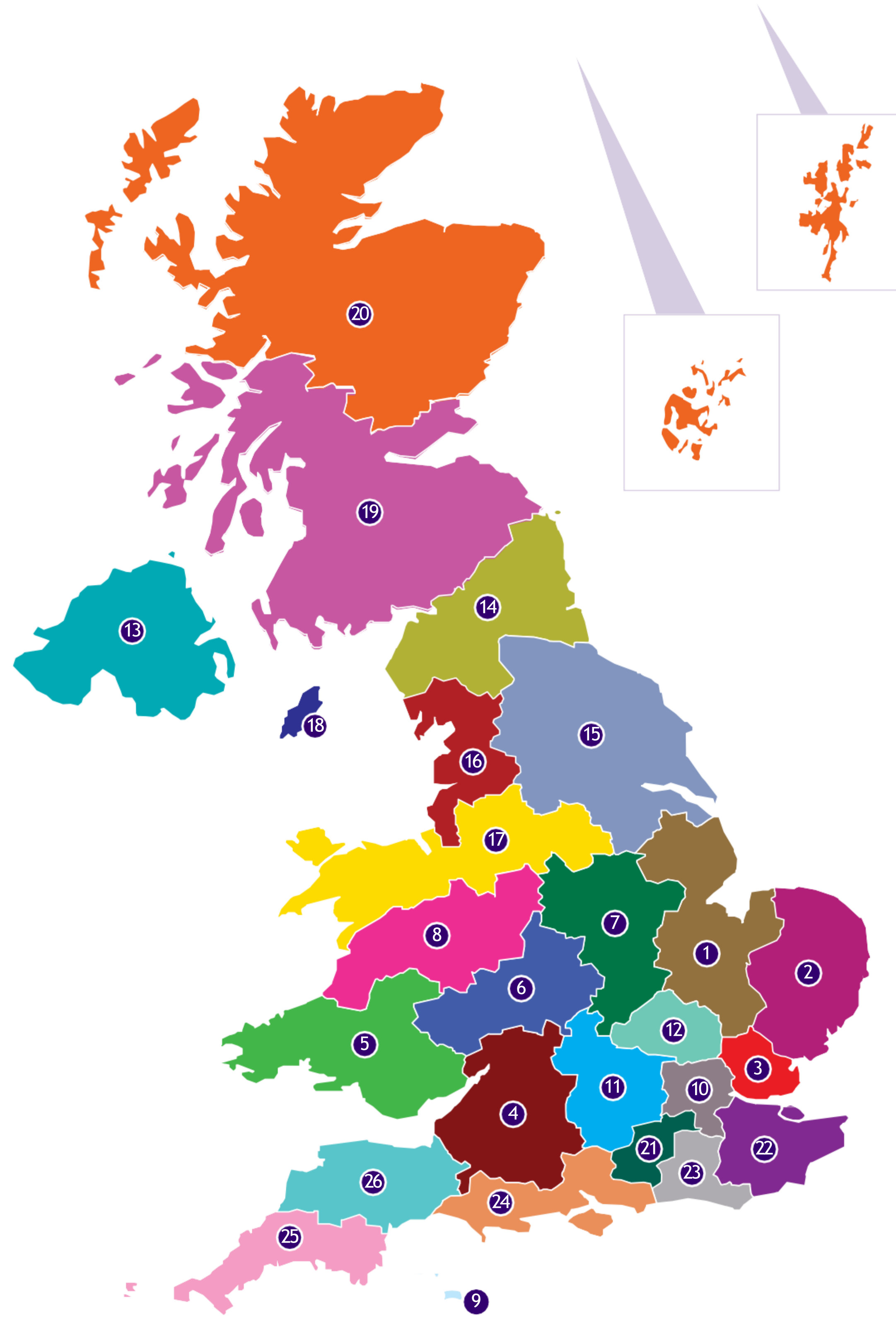
Chartered Connections events are organised exclusively for our Chartered members. They allow interactivity, networking and sharing of ideas on relevant subjects and are traditionally done in conjunction with another Chartered Profession.

Details of how to organise and host a Chartered Connections event are included in the Regional Committee / Chartered Connections Event Process Guide.

Appendix 1.1

PFS regional network and Royal Mail postcode coverage

1	Stamford
2	Norfolk
3	Essex
4	Bristol & Cheltenham
5	South Wales
6	Birmingham
7	East Midlands
8	Staffordshire and Shropshire
9	Jersey
10	London
11	Thames Valley
12	Herts & Middx
13	Northern Ireland
14	Tyne Tees
15	Yorkshire
16	Lancashire, Merseyside and Cumbria
17	Greater Manchester
18	Isle of Man
19	Central Scotland
20	North Scotland
21	Surrey
22	Kent
23	Sussex
24	Hants & Dorset
25	Plymouth & Cornwall
26	Exeter & North Devon



Appendix 1.2

	PFS Region	Covering Royal Mail Postcodes	Corresponding Local Institute(s)
1	Stamford	CB, LN, PE (DN, NG)	Bedford and Milton Keynes, Cambridge, Lincoln, Peterborough
2	Norfolk	CO, IP, NR	Norwich, Ipswich, Suffolk and N. Essex
3	Essex	CM, RM, SS (IG	Chelmsford & East Essex & South Essex
4	Bristol & Cheltenham	BA, BS, GL, SN, SP (HR, IG)	Bristol, Cheltenham & Gloucester,
5	South Wales	CF, LD, NP, SA	Cardiff, Swansea
6	Birmingham	B, CV, DY, HR, WR, WS (WV)	Birmingham, Coventry, Stratford-upon-Avon
7	East Midlands	DE, LE, NG, NN	Leicester, Northampton, Nottingham
8	Staffordshire and Shropshire	ST, SY, TF, WV (CW)	Shropshire & Mid Wales, Stoke-on-Trent
9	Channel Isles	JE, GY (IM)	Jersey, Guernsey
10	London	CR, E, HA, IG, N, NW, SM, SW, TW, UB, W, WC, WD, SE (DA, TN, BR)	London, North Downs
11	Thames Valley	HP, OX, RG, SL (GU, MK)	Reading
12	Herts & Middlesex	AL, LU, MK, SG, (EN, HP, N, WD)	Luton & St Albans
13	Northern Ireland	BT	Northern Ireland
14	Tyne Tees	CA, DH, NE, SR (DL, TD, TS, YO)	Newcastle, Carlisle, Middlesbrough,
15	Yorkshire	BD, DL, DN, HD, HG, HU, HX, LS, TS, WF, YO (OL, S)	Leeds, Bradford, Hull, Sheffield, York, Halifax
16	Lancashire, Merseyside and Cumbria	BB, FY, L, LA, PR (WA)	Liverpool, Blackburn and Burnley, Preston & Blackpool, Kendal
17	Greater Manchester	BL, CH, CW, LL, M, OL, S, SK, WA, WN (PR)	Manchester, Chester and N. Wales, Bolton
18	Isle of Man	IM	Isle of Man Insurance and Financial Services Institute
19	Central Scotland	DG, EH, FK, G, KA, KY, ML, PA, TD (PH)	Glasgow, Edinburgh
20	North Scotland	AB, DD, HS, IV, KW, PH, ZE (FK)	Aberdeen, Inverness, Perth & Dundee
21	Surrey	GU, KT (TW)	Guildford
22	Kent	BR, CT, DA, TN, ME	Mid-Kent, Royal Tunbridge Wells, Canterbury and East Kent
23	Sussex	BN, RH (PO, TN)	Sussex
24	Hants & Dorset	BH, DT, PO, SO (GU, SP)	Bournemouth, Southampton
25	Plymouth & Cornwall	PL, TQ, TR (EX)	Plymouth & Cornwall
26	Exeter & North Devon	EX, TA (TQ)	Exeter

For more information regarding your Local Institute please contact your RDE who will put you in touch with your relevant CII Regional Membership Manager:

David Irvine **Tel: 07921 234323** **Email:** David.Irvine@cii.co.uk
Julie Hicks **Tel: 07918 674589** **Email:** Julie.Hicks@cii.co.uk
Matt Ward **Tel: 07843 265559** **Email:** Matt.Ward@cii.co.uk

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Personal Finance Society

Once completed please return this form to:
The Personal Finance Society Central Office:
1st Floor, 21 Lombard Street, London, EC3V 9AH
Or via Daniel.Moodliar@thepfs.org

Non-staff expenses claim form

Personal details

PFS PIN

Full Name

Address

Signature

Date

Purpose of claim:

All Amounts In GBP Sterling

Receipt number	Receipt date	Description (The Tax Authorities require details of all persons included in claims for entertaining expenses)	Business mileage 45p per mile	Travel – air, rail or taxi 27110	Business mileage 27112	Accom & subs 27115	Others
		Total amount claimed:					

Budget holder authorisation signature:

PFS PIN

PFS Accounts Use Only	
Ref	
Fund	
Vendor	
Period	
AP short ref	
Docs ck'd	
Coding ck'd	
Authorisation ck'd	
Advances cleared	
Date paid	
Cheque no	