Financial Planning Practitioner Panel - Application Form

Deadline for entries: 18.00 hours, Friday 9 August 2019

Please complete the form below and email it to the Panel Facilitator, Steve Gazzard, at sjgconsulting@btinternet.com

The application is to be 1 of 12 practitioner members steering the development of Financial Planning skills and good practice content, chaired by past PFS President Sharon Sutton.

The Panel will meet quarterly, two face to face and two virtual. Panel members are expected to attend all meetings and ideally their local quarterly regional events.

The aim is to have a good balance of the following represented on the Panel:

* Large, medium and small businesses
* Different geographical regions
* Gender
* Experience
* Roles: Financial Planner, Paraplanner, Compliance, Business Owner, Employee

The data you share here is for the purposes of this Personal Finance Society Financial Practitioner Panel only and will be treated confidentially.

Initial selection for the roles is by Sharon Sutton (Chair), Steve Gazzard (Facilitator) and Mark Hutchinson (PFS Director of societies and member marketing) using a scoring system for each application. The final selection will be approved by Keith Richards, Chief Executive Officer, Personal Finance Society.

Applicants will be informed of the outcome of their application by Friday 23 August 2019. The first meeting applicable will be face to face on Thursday 19 September at PFS Offices in London.

Contents

* Application Form
	1. Personal & Contact Details
	2. Financial Planning Experience
	3. Vision for Financial Planning
* Separate Attachment
1. Terms of Reference for the Personal Finance Society Practitioner Panel
2. Personal & Contact Details

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| --- | --- |
| Name (title, first name, surname) |  |
| Job Title/Role |  |
| Firm Name |  |
| Size of firm (Number of employees, locations) |  |
| Business address |  |
| Business website address |  |
| Contact details: Email |  |
| Contact details: Work Telephone |  |
| Contact details: Mobile |  |
| PFS Membership Number |  |
| Year you joined the PFS |  |
| Other relevant memberships |  |
| All relevant qualifications |  |
| Please give permission for us to use your email address for updates on this PFS Financial Planning initiative only | Y / N |

1. Financial Planning Experience

|  |  |
| --- | --- |
| Please describe your firmMaximum 100 words |  |
| What does your current role entail?Maximum 100 words |  |
| What does the term Financial Planning mean to you?Maximum 100 words |  |
| How do you explain Financial Planning to prospective clients?Maximum 160 words |  |
| What experiences/skills/competencies do you think you can bring to the panel and this initiative?Maximum 160 words |  |

1. Vision for Financial Planning

|  |  |
| --- | --- |
| The date of the next Panel Meeting isThursday 19 September, 9.30am-1.00pm in London - Are you able to attend? | Y / N |
| What is your vision for Financial Planning in the UK?Maximum 160 words |  |
| What do you believe the Panel’s focus should be for the next 3 years?Maximum 160 words |  |
| How else are you able to support and promote the panel’s work e.g. are you active on social media, member of other financial planning bodies, blogger, conference presenter etc.Maximum 160 words |  |
| Any other comments or suggestions?Maximum 160 words |  |