

# Regional Chair

## Overview of the role

The Regional Chair will be an ambitious and driven figurehead for the Regional Committee members and should act as an ambassador for the society. As well as being the principle Regional Conference host, the Chair should be able to provide direction and leadership to the committee members and Personal Finance Society members.

## **Main duties:**

- 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.
- Be an advocate of the Personal Finance Society.
- Chair and, with the support of the RDE, ensure the smooth 'on the day' running of all quarterly regional conferences.
- Communicate appropriate information to committee members and attendees at regional conferences.
- Facilitate at least four committee meeting per year either face-to-face or virtual.
- Feedback comments and suggestions from members to the RDE and/or Director of Events.
- Host at least four regional committee meetings every year either face to face or virtual.
- Ensure that at least one committee member is aligned with each Local Institute within the region.

## **Key relationships:**

- Regional Development Executives
- Regional Committee members
- Other regional Chairs
- Personal Finance Society head office
- Local Institute Councils

# Person specification

The Regional Chair will be an ambitious and driven figurehead for the Regional Committee members and should act as an ambassador for the society. As well as being the principle Regional Conference host, the Chair should be able to provide direction and leadership to the committee members and Personal Finance Society members.

## Key attributes

<b>Essential:</b>	<ul style="list-style-type: none"> <li>• Commitment to give back to the region and profession in general and proactively look for opportunities to engage with local members and organisations</li> <li>• Confident and experienced speaker with excellent interpersonal and communication skills</li> <li>• An interest in representing the Personal Finance Society and its goals on a local level</li> <li>• Passionate about the cause of financial services profession.</li> </ul>
<b>Desirable:</b>	<ul style="list-style-type: none"> <li>• Energetic personality</li> <li>• Relationship with LI council member(s) tbc</li> </ul>

*NB: this framework has been created to enable prospective Chairs to self-select for the role and should not be seen as a barrier to those who wish to take on the role.*

<b>What you can expect from us</b>	<ul style="list-style-type: none"> <li>• An 'open door' policy - we will always be available for support and guidance whenever one of our volunteers need it.</li> <li>• Regular and transparent communications from Central Office including the monthly RDE's Committee Connections newsletter.</li> <li>• We will hold an introductory call with Chairs (where a face-to-face meeting is not possible) to run through the role, gain an insight into their motivations and to outline our expectations.</li> <li>• Access to an induction document that outlines suggested activities to be completed during the 1st 3 months, 6 months and 1 year into the role to enable committee members to get the most out of their role.</li> <li>• All Chairs will be provided with content to present during their Regional Conference.</li> <li>• All Chairs can expect to be amongst the first to hear about regional and national PFS developments.</li> <li>• Invitation to the annual Officer's Conference.</li> </ul>
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<b>Key relationships:</b>	<ul style="list-style-type: none"> <li>• Regional Development Executives</li> <li>• Regional Committee members</li> <li>• Other regional Chairs</li> <li>• Personal Finance Society head office</li> <li>• Local Institute Councils</li> </ul>
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# Professional Qualifications Officer

## Overview of the role

The Professional Qualifications Officer will be passionate about developing the training needs and competency of members. This will largely be achieved by assessing member requirements, hosting additional regional events and having oversight of Local Institute events that might be relevant to Personal Finance Society members.

## **Main duties:**

- Promotion of qualification framework – via speaking slot at quarterly conference as well as manning the PFS stand
- Organisation and promotion of additional CPD events and activities in either locally or in conjunction with neighbouring regions and institutes
- Port of call for local members on queries relating to CPD, training and qualification framework
- Encourage members locally to pursue additional qualifications / develop CPD
- Provide revision session for local members undertaking examinations
- Support Chair and other committee members at physical or virtual events where possible
- 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 Committee
- Regional Development Executives
- Other regional Professional Qualifications Officers
- Local Institute Education Officer / CPD Secretaries
- Wider engagement team – The Personal Finance Society.

# Person specification

The Professional Qualifications Officer will be interested in promoting and assisting the Continuous Professional Development of the regional membership. The Professional Qualifications Officer will be proactive and always looking for opportunities to promote the Personal Finance Society's education path objectives.

## Key attributes

### Essential:

- Be an advocate for professional development
- Familiarity with CII study, tutorial and examination facilities Passionate about the cause of financial capability.

### Desirable:

- Confident speaker with excellent interpersonal and communication skills
- A desire to improve your own personal and professional development whilst helping others

*NB: this framework has been created to enable prospective Professional Qualifications Officers to self-select for the role and should not be seen as a barrier to those who wish to take on the role.*

### What you can expect from us

- An 'open door' policy - we will always be available for support and guidance whenever one of our volunteers need it.
- Regular and transparent communications from Central Office including the monthly RDE's Committee Connections newsletter and updates on Exams programme.
- We will hold an introductory call with new Professional Qualifications Officers (where a face-to-face meeting is not possible) to run through the role, gain an insight into their motivations and to outline our expectations.
- Access to an induction document that outlines suggested activities to be completed during the 1st 3 months, 6 months and 1 year into the role to enable committee members to get the most out of their role.
- Professional Qualifications Officers will be provided with content to present during their Regional Conference where available.
- Invitation to the annual Officer's Conference.

### Key relationships:

- Regional Committee
- Regional Development Executives
- Other regional Professional Qualifications Officers
- Local Institute Education Officer / CPD Secretaries
- Wider engagement team – The Personal Finance Society.

# Membership Officer

## Overview of the role

The Membership Officer will be an outgoing and enthusiastic Regional Committee member who will be passionate about encouraging greater member participation in regional conferences and activities, together with the recruitment of new members and retention of existing ones.

## **Main duties:**

- Promotion of membership proposition via speaking slot at quarterly conference.
- 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.
- Seek ways of encouraging member and non-member attendance at regional conferences including the provision of material for quarterly regional newsletters to be sent via Central Office and social media channels
- Post-event follow-up with non-members in line with membership strategy
- Support Chair and other committee members at physical or virtual events where possible
- Promotion of the Personal Finance Society app
- Organising events locally for new members – possibly social /soft-skill
- Develop new ways of promoting the benefits of Personal Finance Society membership to non-members
- 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 Committee
- Regional Development Executives
- Other regional Membership Officers
- Local Institute Council
- Marketing Team – PFS/CII
- Engagement Team - The Personal Finance Society

# Person specification

The Membership Officer will be an outgoing and enthusiastic Regional Committee member who will be passionate about encouraging greater member participation in regional conferences and activities, together with the recruitment of new members and retention of existing ones.

## Key attributes

<b>Essential:</b>	<ul style="list-style-type: none"> <li>• An in-depth understanding of the Personal Finance Society's membership proposition and benefits</li> <li>• Excellent interpersonal and communication skills.</li> <li>• Passionate about the benefits of membership.</li> </ul>
<b>Desirable:</b>	<ul style="list-style-type: none"> <li>• Confident speaker</li> <li>• 'People person'</li> </ul>

*NB: this framework has been created to enable prospective Membership Officers to self-select for the role and should not be seen as a barrier to those who wish to take on the role.*

<b>What you can expect from us</b>	<ul style="list-style-type: none"> <li>• An 'open door' policy - we will always be available for support and guidance whenever one of our volunteers need it.</li> <li>• Regular and transparent communications from Central Office including the monthly RDE's Committee Connections newsletter and updates on new membership initiatives</li> <li>• We will hold an introductory call with new Membership Officers (where a face-to-face meeting is not possible) to run through the role, gain an insight into their motivations and to outline our expectations.</li> <li>• Access to an induction document that outlines suggested activities to be completed during the 1st 3 months, 6 months and 1 year into the role to enable committee members to get the most out of their role.</li> <li>• Members Officers will be provided with content to present during their Regional Conference where available.</li> <li>• Invitation to the annual Officer's Conference.</li> </ul>
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<b>Key relationships:</b>	<ul style="list-style-type: none"> <li>• Regional Committee</li> <li>• Regional Development Executives</li> <li>• Other regional Membership Officers</li> <li>• Local Institute Council</li> <li>• Marketing Team – PFS/CII</li> <li>• Engagement Team - The Personal Finance Society</li> </ul>
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# New Professional's Officer

## Overview of the role

The New Professional's Officer will be an energetic and enthusiastic person who is passionate about encouraging the engagement of the younger and new members of the profession by raising awareness of the Personal Finance Society proposition

**Definition of New Profession:** Less than 10 years in the profession (not generally age related)

## **Main duties:**

- Promotion of Personal Finance Society proposition to new and younger members of the profession via PFS conferences and social media
- Encourage attendance to regional conferences
- Organising events for young professionals or those new to the industry locally or in conjunction with neighbouring regions and local institutes.
- Explore ways of promoting and generating wider interest in the Personal Finance Society amongst new and younger professionals
- Speaking slot at regional conference when applicable
- Support Chair and other committee members at physical or virtual events where possible

## **Key relationships:**

- Regional Committee
- Regional Development Executives
- Local Institute Council
- Other regional New Professionals' Officers
- Local Next Gen networks
- Membership Marketing – The Personal Finance Society
- Engagement Team - The Personal Finance Society
- Social media

# Person specification

The New Professional's Officer will be an energetic and enthusiastic person who is passionate about encouraging the engagement of the younger and new members of the profession by raising awareness of the Personal Finance Society proposition

## Key attributes

<b>Essential:</b>	<ul style="list-style-type: none"> <li>• Commitment to raising the profile of the younger/new members of the profession</li> <li>• Ability to network effectively with excellent interpersonal and communication skills</li> <li>• Passionate about the future of the profession</li> <li>• A 'thinking outside the box' approach</li> </ul>
<b>Desirable:</b>	<ul style="list-style-type: none"> <li>• Knowledge on the use of social media platforms</li> <li>• Confident speaker</li> <li>• Working with young people in an education or extra-curricular setting.</li> </ul>

*NB: this framework has been created to enable prospective New Professional's Officers to self-select for the role and should not be seen as a barrier to those who wish to take on the role.*

<b>What you can expect from us</b>	<ul style="list-style-type: none"> <li>• An 'open door' policy - we will always be available for support and guidance whenever one of our volunteers need it.</li> <li>• Regular and transparent communications from Central Office including the monthly RDE's Committee Connections newsletter.</li> <li>• We will hold an introductory call with newly onboarded New Professionals Officers (where a face-to-face meeting is not possible) to run through the role, gain an insight into their motivations and to outline our expectations.</li> <li>• Access to an induction document that outlines suggested activities to be completed during the 1st 3 months, 6 months and 1 year into the role to enable Ambassadors to get the most out of their role.</li> <li>• New Professionals Officers will be provided with content to present during their Regional Conference where available. Invitation to the annual Officer's Conference.</li> <li>• Invitation to the annual Officer's Conference.</li> </ul>
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<b>Key relationships:</b>	<ul style="list-style-type: none"> <li>• Regional Committee</li> <li>• Regional Development Executives</li> <li>• Local Institute Council</li> <li>• Other regional New Professionals' Officers</li> <li>• Engagement Team - The Personal Finance Society</li> </ul>
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|  | <ul style="list-style-type: none"><li>• Social media</li></ul> |
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# Education Outreach Ambassador

## Overview of the role

The Education Outreach Ambassador will be an ambitious and enthusiastic Regional Committee member who will assist in the raising of profile, awareness and understanding of the My Personal Finance Skills programme with members and local schools. This pro bono programme includes the financial education resources as well as the Discover Fortunes game.

## **Main duties:**

- Running a series of sessions to local schools throughout the year (financial education sessions).
- Raising awareness of the programme, gaining support of its work and promoting initiatives via a personal local network of contacts.
- Promoting the programme to local schools to increase school engagement and to assist with Education Champion- School matching process.
- Acting as a point of contact for local Education Champions.

## **Key relationships:**

- CII Relationship Manager - Education
- Local schools and colleges
- Education Champions
- Committee members.



# Person specification

The Education Outreach Ambassador will be passionate about financial capability and raising awareness of the My Personal Finance initiative to wider stakeholders. The Ambassador will be proactive and always looking for opportunities to promote the Personal Finance Society's objectives.

## Key attributes

<b>Essential:</b>	<ul style="list-style-type: none"> <li>• Commitment to give back to local community and proactively look for opportunities to engage with local schools</li> <li>• Confident and experience speaker with excellent interpersonal and communication skills</li> <li>• An interest in engaging with schools and students about personal finance</li> <li>• Passionate about the cause of financial capability.</li> </ul>
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<b>Desirable:</b>	<ul style="list-style-type: none"> <li>• Local educator contacts to help engagement with local secondary schools</li> <li>• Experience in the education or training sector</li> <li>• Working with young people in an education or extra-curricular setting.</li> </ul>
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*NB: this framework has been created to enable prospective Education Outreach Ambassadors to self-select for the role and should not be seen as a barrier to those who wish to take on the role.*

<b>What you can expect from us</b>	<ul style="list-style-type: none"> <li>• An 'open door' policy - we will always be available for support and guidance whenever one of our volunteers need it.</li> <li>• We will hold an introductory call with Ambassadors (where a face to face meeting is not possible) to run through the role, gain an insight into their motivations and to outline our expectations.</li> <li>• Access to an induction document that outlines suggested activities to be completed during the 1st month, 6 months and 1 year into the role to enable Ambassadors to get the most out of their role.</li> <li>• We will provide information about the programme including resources, promotional materials and access to online training tutorials to get started.</li> <li>• Ambassadors can expect to be amongst the first to hear about the developments of the initiative.</li> <li>• All ambassadors will be provided with content to present during their Regional Conference.</li> <li>• Invitation to the annual Officer's Conference.</li> </ul>
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<b>Key relationships:</b>	<ul style="list-style-type: none"> <li>• CII Relationship Manager – Education</li> <li>• Local schools and colleges</li> <li>• Committee members</li> <li>• Education Champions</li> </ul>
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# Chartered Champion

## Overview of the role

The Chartered Champion will be passionate about and committed to promoting Chartered status and providing assistance and guidance on the 'Road to Chartered'. The Chartered Champion will be a focal point for the benefit of Chartered status within the regional and will be called on to host Chartered events.

## **Main duties:**

- 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.
- Representing the Personal Finance Society and acting 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, social media, radio and local community events.
- Support Chair and other committee members at physical or virtual events where possible

## **Key relationships:**

- Regional Committee
- Regional Development Executives
- Other regional Chartered Champions
- Local Institute Membership Secretaries
- Local Chartered Financial Planners
- Local legal, accountancy and other professional firms
- Local press/media

# Person specification

The Chartered Champion will be passionate about and committed to promoting Chartered status and providing assistance and guidance on the 'Road to Chartered'. The Chartered Champion will be an ambassador for the benefit of Chartered status within the regional and will be called on to host Chartered events.

## Key attributes

<b>Essential:</b>	<ul style="list-style-type: none"> <li>• Must be of Chartered Status or above</li> <li>• Commitment to give back to profession and assist other of the 'Road to Chartered'.</li> <li>• Confident and experience speaker with excellent interpersonal and communication skills.</li> <li>• An interest in engaging with other Chartered Financial Planners</li> <li>• Passionate about protecting the Chartered brand.</li> </ul>
<b>Desirable:</b>	<ul style="list-style-type: none"> <li>• Good organisational skills</li> </ul>
<p><i>NB: this framework has been created to enable prospective Chartered Champions to self-select for the role and should not be seen as a barrier to those who wish to take on the role.</i></p>	
<b>What you can expect from us</b>	<ul style="list-style-type: none"> <li>• An 'open door' policy - we will always be available for support and guidance whenever one of our volunteers need it.</li> <li>• Regular and transparent communications from Central Office including the monthly RDE's Committee Connections newsletter.</li> <li>• We will hold an introductory call with newly onboarded Chartered Champions (where a face-to-face meeting is not possible) to run through the role, gain an insight into their motivations and to outline our expectations.</li> <li>• Access to an induction document that outlines suggested activities to be completed during the 1st 3 months, 6 months and 1 year into the role to enable Ambassadors to get the most out of their role.</li> <li>• Chartered Champions will be provided with content to present during their Regional Conference where available.</li> <li>• Invitation to the annual Officer's Conference.</li> </ul>
<b>Key relationships:</b>	<ul style="list-style-type: none"> <li>• Regional Committee</li> <li>• Regional Development Executives</li> <li>• Other regional Chartered Champions</li> <li>• Local Institute Council</li> <li>• Local Chartered Financial Planners</li> <li>• Local legal, accountancy and other professional firms</li> </ul>

# SMP Advocate

## Overview of the role

The SMP Advocate will be committed to the raising of standards and passionate about demonstrating professionalism within the Mortgage sector. They will be a focal point within the region for the benefits of SMP membership, Associate Firm status, and Mortgage Related qualifications and support, and will be called on to support with regional Mortgage events.

## **Main duties:**

- To be the local Society of Mortgage Professionals advocate for members and Associate Firm status in their region.
- Promotion of mortgage proposition – via Ongoing engagement with SMP members at conferences and a possible speaking slot at quarterly conference.
- Representing the Society of Mortgage Professionals and acting as host at a variety of events (face to face or virtual) organised centrally specifically for Mortgage Advisers.
- To arrange Mortgage 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 SMP brand to the public through engagement with social media, local press, radio and local community events.

## **Key relationships:**

- Regional Committee
- Regional Development Executives
- Local Institute Membership Secretaries
- Local Associate Firms
- Local legal, accountancy and other professional firms
- Local press/media

# Person specification

The SMP Advocate will be committed to the raising of standards and passionate about demonstrating professionalism within the Mortgage sector. They will be a focal point for the benefits of SMP membership, Associate Firm status, and Mortgage Related qualifications and will be called on to support with regional Mortgage events.

## Key attributes

<b>Essential:</b>	<ul style="list-style-type: none"> <li>• Must be a qualified Mortgage Adviser</li> <li>• Commitment to give back to profession and assist others</li> <li>• Excellent interpersonal and communication skills</li> <li>• An interest in engaging with other Mortgage &amp; Protection Advisers</li> <li>• Passionate about promoting the SMP brand.</li> </ul>
<b>Desirable:</b>	<ul style="list-style-type: none"> <li>• Good organisational skills</li> <li>• Confident and experienced speaker</li> </ul>

*NB: this framework has been created to enable prospective SMP Advocates to self-select for the role and should not be seen as a barrier to those who wish to take on the role.*

<b>What you can expect from us</b>	<ul style="list-style-type: none"> <li>• An 'open door' policy - we will always be available for support and guidance whenever one of our volunteers need it.</li> <li>• Regular and transparent communications from Central Office including the monthly RDE's Committee Connections newsletter.</li> <li>• We will hold an introductory call with newly onboarded SMP Advocates (where a face-to-face meeting is not possible) to run through the role, gain an insight into their motivations and to outline our expectations.</li> <li>• Access to an induction document that outlines suggested activities to be completed during the 1st 3 months, 6 months and 1 year into the role to enable Ambassadors to get the most out of their role.</li> <li>• SMP Advocates will be provided with content to present during their Regional Conference where available.</li> <li>• Invitation to the annual Officer's Conference.</li> </ul>
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<b>Key relationships:</b>	<ul style="list-style-type: none"> <li>• Regional Committee</li> <li>• Regional Development Executives</li> <li>• Local Institute Council</li> <li>• Local Associate Firms</li> <li>• Local legal, accountancy and other professional firms</li> </ul>
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