



24th August 2022

PFS Notice of AGM 2022

Dear Member,

We are delighted to invite you to The Personal Finance Society's 2022 Annual General Meeting (AGM), which will be held in person at Reading Football Club, Select Car Leasing Stadium, Reading, RG2 0FL and virtually at 2.00pm (BST) on Tuesday, 20th September.

As the uncertainty created by the COVID-19 pandemic has lessened, we and our fellow Board members are pleased that we are able to host this year's AGM where we can meet face-to-face, and encourage all members to attend if they are able. We appreciate that this may not be possible for many members, so we will also be making the meeting available online. The details of access for all who wish to attend remotely are available on the PFS website.

The 2022 AGM will provide an opportunity for you to meet our new interim CEO, Don MacIntyre. This is an exciting time for the PFS and there is much to update you on, and we are looking forward to exploring this with you at the meeting.

Our vision for the PFS for the next three years is to continue the PFS's role in leading the UK financial planning community; expanding our skills and achieving higher levels of professionalism. Additionally to all of the formal business during the meeting we will be holding a brief moderated Q&A session to ensure you and your fellow members are fully informed of the vital work the Society is undertaking, and to give you confidence that your views and contributions are being heard, are valued and acted upon. The meeting will provide a terrific opportunity for us to come together as a profession, and we hope that you feel able to attend and contribute during your AGM.

We would also like to take this opportunity to highlight the upcoming Festival of Financial Planning in November 2022, details of which can be found at www.pfsfestival2022.org. This will provide an excellent platform to share good practice, hear from first class speakers as well as showcase and celebrate the accomplishments in our sector.

Many thanks for your continued support, and we hope to see you on Tuesday, 20th September.

Sarah Lord,
President

Caroline Stuart,
Vice President

Vanessa Barnes,
Vice President

Encs.
Formal AGM Notice

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The Personal Finance Society is a limited company registered in England and Wales with registered number 5084125 and its registered office at 3rd Floor, 20 Fenchurch Street, London, EC3M 3BY