

Proudly professional

Benefit from membership of the Personal Finance Society

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 increasingly influential in driving the professionalism agenda on behalf of more than 34,000 members.

By becoming a member you can

- 1. Demonstrate your commitment to professional standards**
- 2. Continually improve your knowledge and skills**
- 3. Achieve your career aspirations with the support of a professional network**

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By becoming a member you can

1. Demonstrate your commitment to professional standards

- Highlight your professional qualifications through respected designations
- Demonstrate your credentials with a Statement of Professional Standing (SPS)
- Underpin your credibility by committing to a code of ethics
- Become the best you can be through Continuing Professional Development (CPD)
- Help to re-engage the confidence and trust of the public and a parity of esteem with other established professions.

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By becoming a member you can

2. Continually improve your knowledge and skills

- Access high quality Continuing Professional Development events, training and online resources
- Be part of a regional network offering mentoring, support and guidance
- Log-in to www.thepfs.org, your gateway to knowledge and CPD
- Receive regular news, technical and regulatory update emails
- Access technical news and features via our online knowledge hub
- Get your regular copy of Financial Solutions magazine
- Attend the flagship PFS Annual Conference.

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By becoming a member you can

3. Achieve your career aspirations with the support of a professional network

- Access PFS regional events and those of your local insurance institute
- Attend events to give you the skills and knowledge to succeed
- Qualify for discounts on CII professional qualifications, study and revision
- Get help with exam technique and an online library of exam guides
- Work toward Chartered Financial Planner status
- Access tools and frameworks to help develop your business
- Build your team with the support of industry standard training programmes
- Stand out from the crowd by becoming a Chartered Financial Planning firm
- Find opportunities to participate in pro-bono initiatives local to you.

Boosting your professionalism

Knowledge

As a member you have access to the most respected suite of professional qualifications in financial services, whether you are learning the ropes or are an experienced Chartered Financial Planner. PFS members benefit from substantial discounts on course prices and learning materials, so membership can effectively pay for itself.

The Diploma in Regulated Financial Planning is the benchmark qualification for financial planners, but other specialist qualifications, such as Paraplanning or Investment Management can set you well on your way to an alternative career path.

A range of other membership services give you direct access to up to date technical news, features and fact files that can help you acquire and maintain the level of knowledge suitable for your role.

“The study manuals made learning easy.”

Gerald Lambourne, Cert PFS

Knowledge is the lifeblood of a fast-changing market and membership keeps you in touch

Knowledge

Recognition

Development

Standards

Networking

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Boosting your professionalism

Recognition

When you qualify, as a PFS member you can use the relevant designatory letters to highlight your achievement and professional standing to your clients, peers and employer.

If you are an authorised financial planner you will also be able to apply for your Statement of Professional Standing (SPS), further confirmation that you meet, and adhere to, high professional standards.

Chartered status is available to experienced members who achieve advanced qualifications. It represents the pinnacle and is widely recognised by Consumers. Chartered status affords members the same respect and trust afforded to other, more established, Chartered professions.

“It gives me an advantage over non-qualified people.”

John McCafferty, ACII, APFS,
Chartered Financial Planner

Chartered Financial Planner status represents the gold standard and it gives consumers greater confidence and trust

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Boosting your professionalism

Development

Professional learning doesn't stop after exams – ensuring you remain competent and up-to-date is the true mark of a professional. Membership is your way to stay in touch and stay ahead. Qualified membership of the Personal Finance Society requires a commitment to Continuing Professional Development (CPD).

As a member you are invited to attend regional and national events focused on improving your skills and knowledge and helping you become the best at what you do. You can expect to fulfill a significant amount of your annual CPD commitment by participating in our events or online activities.

Every quarter members have access to a free regional conference that provides training on a hot-topic subject. Members also get the opportunity to apply knowledge through a facilitated case study, as well as sharing best practice with their peers. These events offer practical support and development to members, who leave armed with plenty of new ideas that they can immediately put into practice. Many of our face-to-face events are now filmed and shared with members via our website.

Every year you will be able to use our events and web-based resources to help satisfy your CPD commitment.

“The regional event programme has given me the knowledge and confidence to improve my service offering.”

Philip Piggins MSc, Cert PFS

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Boosting your professionalism

Standards

As a member you have your part to play by demonstrating high standards of professionalism. Members of the Personal Finance Society commit to a Code of Ethics, intended to demonstrate the highest professional and ethical standards.

Many aspects of the Code are good business practice. It deals with law, culture and different stakeholder relationships and includes guidance on:

- Behaving responsibly and with integrity
- Being fair and trustworthy
- Demonstrating competence and due care
- Respecting confidentiality
- Applying objectivity in professional judgement

As a member you have access to client-facing literature that explains the importance of your membership of the UK's leading professional body. Association with the highest standards can help to engender trust.

“The PFS has helped me demonstrate my professionalism.”

Chris Denham, Dip PFS

Ethics are at our core and the code of ethics is a powerful tool for members.



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Boosting your professionalism

Networking

One of the most valuable benefits you will enjoy as a member of the Personal Finance Society will be the support and guidance offered by fellow members. Whether through the conferences, study groups or participation in technical case studies you will improve your understanding of key technical subjects, as well as learning about new ideas that you can apply in your role.

The Personal Finance Society has 26 regions, run by enthusiastic member volunteers. Attending regional events are a great way to stay up to date, network with fellow professionals and learn something new. What's more, attendance at such events can count towards your CPD.

“Being able to network with like minded people has been key to my development.”

Harriet Trendell, Cert PFS

Professional networking can be invaluable in sharing best practice.

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Part of the CII Group

When you join the Personal Finance Society you will benefit from membership of the wider Chartered Insurance Institute Group (CII), the world's leading provider of professional training, qualifications and thought leadership to the insurance and financial services profession. The CII has been at the forefront of setting professional standards for over a century and now has over 110,000 members in 150 countries.

The PFS and CII are focused on engendering public confidence and trust in the financial services profession by setting standards and increasing professionalism.



It all adds up to professionalism

Personal Finance Society
Standards | Professionalism | Trust



Knowledge

We'll help you develop a well respected level of technical knowledge.

Recognition

Professional qualifications are the basis of consumer trust.

Development

In a fast moving profession it's essential to keep your knowledge updated.

Networking

We are a people business – membership helps you connect with the right people.

Standards

Members proudly commit to the highest professional standards.

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Join us now...

Wherever you start
your journey there's
a card with your
name on it.



Apply online
www.thepfs.org/join
Or call 020 8530 0852