

Personal  
Finance  
Society

Standards. Professionalism. Trust.

# The benefits of **PFS membership**

Being a member of the Personal Finance Society is more than just a designation - it's a commitment to your professional growth and success.

**Maximise Your Success**





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## About the PFS

**The Personal Finance Society (PFS) is the pre-eminent professional membership body in financial planning. It represents around 40,000 members, mostly in the UK.**

The PFS is part of the Chartered Insurance Institute, a Royal Charter corporation, which comprises a group of companies across the insurance and personal finance sectors.

## Our Mission

The Society educates and supports our members to deliver services to the highest professional standards and to advocate for the public good. It aims to build and maintain public trust in the financial planning profession.



# The Membership Advantage



## Credibility

**Membership conveys professional recognition and helps build reputations.**

Demonstrate your credibility by displaying your membership certificate or card. Chartered is the universally recognised badge of professionalism by your peers, clients and employers.



## Community

**Membership expands networks and creates new opportunities.**

Our programme of national and local events and webinars brings together advisers, financial planners, paraplanners, compliance specialists and other personal finance professionals from across the UK.



## Career

**Membership accelerates career ambitions by developing skills and expertise faster.**

From CPD events and digital resources to a member magazine, career coaching tool and podcast, there are countless benefits which can support your career development.



# Core Benefits

## PFS Events

Our flagship programme of in-person and digital events delivers 30+ events each year. Three series of roadshows - in spring, summer and autumn - explore topical themes which matter to all personal finance professionals. These are complemented by a series of tailored specialist roadshows ahead of the highlight of the year - the PFS National Conference.

[thevfs.org/events](https://thevfs.org/events)

## PFS Local

Our volunteer-led committees across 26 PFS Regions deliver a programme of local engagement across a mix of in-person and digital events. These PFS Local events allow you to undertake CPD at a local level and strengthen your network of contacts across your region.

[thevfs.org/local](https://thevfs.org/local)

## PFS POWER

Enhance your financial planning skills with PFS POWER. Hundreds of free learning resources (including weekly webinars, guides, podcasts, videos and articles) designed and delivered by financial planning practitioners for practitioners in all financial planning roles.

[pfspower.org](https://pfspower.org)



## PFS Paraplanners

A growing community which allows individuals who specialise in paraplanning to network and learn from each other. Discover tools and resources including an annual conference, bitesized learning webinars, a dedicated LinkedIn group and tailored guides and articles about paraplanning.

[thevfs.org/paraplanners](https://thevfs.org/paraplanners)

## Core Benefits

### FutureMe

**FutureMe** is our online career coaching platform. It includes a CV builder/checker, Interview 360 simulator, 5000+ videos and 800+ e-learning courses, articles, podcasts and interactive tools to support your career.



### Connect

**Connect** is our digital e-mentoring platform, which matches individuals in accordance with specific criteria, such as skills, experience and sector. It allows for online or in-person connections anywhere in the world.

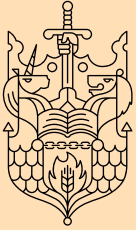


### Professional Map

The **Professional Map** outlines the key behaviours and expertise needed to succeed today. Use it to enhance your development and career progression, identify training needs, prepare for appraisals, job applications, and interviews.



[thepfs.org/futureme](https://thepfs.org/futureme)  
[thepfs.org/connect](https://thepfs.org/connect)  
[thepfs.org/professionalmap](https://thepfs.org/professionalmap)



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