

News Release

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LOCAL ADVISER BECOMES CHARTERED CHAMPION FOR PERSONAL FINANCE SOCIETY

Derek Capelin, Managing Director and Chartered Financial Planner from Capelin Financial Management Limited in Solihull, has been selected as the Birmingham and West Midlands regional 'Chartered Champion' for the Personal Finance Society (PFS), the leading professional organisation for financial advisers in the UK.

This initiative by the PFS, which is part of the Chartered Insurance Institute (CII) group, is aimed at raising the profile of Chartered status for financial planners and firms among local business communities and consumers.

Fay Goddard, CEO of the PFS says: "Now, more than ever, consumers are demanding that financial advisers and planners demonstrate their professional expertise. Consumers want to deal with individuals and firms who provide first-class service and trusted advice that helps them meet their financial goals.

"Chartered status is a recognised brand in itself and consumers value it as an indication of merit, capability and commitment to ethical practice. Chartered Financial Planner status is relatively new to the Chartered family, so the benefits need to be promoted to the sector and the public."

In his role as chartered champion, Derek Capelin will be the local advocate for achieving Chartered status in the region, represent the PFS and the CII as well as host a variety of events for Chartered Financial Planners, including Chartered Business Dinners and Chartered Connections Clubs.

Fay Goddard adds: "As an excellent advocate for the profession, Derek is perfect for the Chartered Champion role as he is passionate about the benefits that chartered status brings and is very eager to get involved in the development of the financial planning profession. I am delighted to welcome him on board."

Derek Capelin said: "Both for individual advisers or firms of advisers, Chartered status provides an edge over competitors. It is an objective measurement and verification of a

professional approach to meeting clients' needs and it's the seal of approval that sets the professional adviser apart."

"During my career I have worked throughout the Midlands region as an Independent Financial Adviser, including a regional management role with the British Medical Association. In 1992 I qualified as a Fellow of the Chartered Insurance Institute, and I became a Chartered Financial Planner in 2005. Just as the public expects the highest professional standards when they use a Chartered accountant or surveyor, Chartered status means it's no longer a lottery when you choose a Chartered Financial Planner."

"Also, and perhaps most importantly, as more and more advisers achieve Chartered status, I hope that the perception of the sector as a whole will gain more credibility. I am very excited about this voluntary role and the new challenges it brings."

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Notes to Editors

The Personal Finance Society

The Personal Finance Society is the leading professional organisation for financial advisers and those in related roles. With over 25,000 members, it promotes the highest standards of professionalism in the industry.

It sets the standards for technical knowledge, customer service and ethical practice across the entire financial advice community. To achieve its aims, the Society provides its members with access to technical qualifications, learning materials, support services and practical benefits.

The CII

The CII is the world's leading professional organisation for insurance and financial services. Its 95,000

members are committed to maintaining the highest standards of technical competence and ethical conduct.

A robust framework of learning and development solutions enables the CII to support corporate partners and individuals across the sector. It ensures that all members comply with minimum standards and inspires many more to achieve advanced levels of technical and professional competence.