

# Officers' Conference inspires regional leadership

The 2009 PFS Officers' Conference, held in Manchester's Hilton Hotel in May, was aimed at the enthusiastic and committed member-elected volunteers who run the PFS regional networks and help improve the member proposition for members across the UK.

The Conference focused on supporting the PFS's educational efforts and gave regional officers an opportunity to discuss and share best value, as well as agree on guiding action plans for the next 12 months.

Presentations by key PFS staff members, including CEO Fay Goddard, focused on PFS activities, best practice and qualifications. Fay said: "The Officers' Conference has reaffirmed that the Society is working with individuals that make up our regional committees who embrace professionalism and all that it entails. We will continue to offer essential support and guidance to these individuals and ensure that we listen to their needs to ensure that they are delivering



**Grant: seeking volunteers**

the best service possible to our members.

"I am delighted that some of our Area Liaison Officers have already started to make inroads in developing relationships with the CII local institutes, which will in turn improve the membership proposition we offer our members at a local level."

Paul Lothian, PFS President, stressed the importance of the regional network: "Our regions are an excellent conduit for delivering our Society's core messages and values, as well as delivering CPD and networking opportunities to our members. As regional meetings are many members' primary means of engagement with PFS, it is essential that they reflect and demonstrate the professional values which the PFS espouses, and which we believe our membership should embrace. It is vital that regional committees are seen as enthusiastic advocates of our over-arching objective of setting, achieving and maintaining higher levels of professionalism across the financial advice sector."

The working sessions of the event were chaired by PFS Board director, Eddie Grant, who issued a special call for volunteers to serve across the regional network.

The event attracted over 40 delegates and will become an annual event within the PFS calendar.

## Chelmsford & South Essex CII combine with PFS

The Chelmsford & South Essex CII local institute is to run two workshops specifically for PFS members, as part of its 2009-10 event programme.

The first of these events will be presented by Brett Davidson of FP Advance. 'What really drives improved profits in your business?' will take place on Wednesday 4 November, with the second event, 'An introduction to Group Risks' by Daniel Stewart and Marion Ware of Canada Life, scheduled for Wednesday 24 March 2010.

The institute is also looking to host financial services revision training courses in advance of the October and April CII examinations.

For further details visit: [www.cii.co.uk/local/chelmsford](http://www.cii.co.uk/local/chelmsford)

## Capelin achieves ISO22222

Derek Capelin, managing director of Capelin Financial Management in Solihull, has achieved the prestigious BS-accredited ISO 22222 kite mark in financial planning. This new British Standard became available in 2008 to measure the ability and processes of individual financial planners.

The standard is designed to raise service levels for consumers and set a benchmark for practitioners beyond the current minimum regulatory requirements. It sets expectations for personal financial planners and codifies best practice in financial planning in line with global standards.

By adopting BS ISO 22222 the personal financial planner



**Capelin: wonderful endorsement of the standards we apply**

demonstrates continued competency following the necessary training programmes, maintaining records so that conformity to a high academic standard can be claimed.

Capelin said: "This is a wonderful endorsement of the high quality standards we apply throughout our practice in delivering the best financial solutions to the needs of our clients throughout Solihull

and the West Midlands. The independent accreditation process was a demanding review of every aspect of our financial planning practice. The assessment team conducted a thorough quality examination of the day-to-day operation of our business principles and practices.

"The BS ISO 22222 endorsement has given us renewed confidence that our clients benefit from the best professional standards available. I found this challenging process to be one of the most rewarding experiences in my financial planning career."

Capelin Financial Management Limited is a firm of Chartered Financial Planners.