

# Annual Report: 2018-2019



The Insurance  
Institute of Leicester  
Chartered Insurance Institute

## Introduction

Under the leadership of our President, Christopher Macleod Cert CII, we have had another successful year. Highlights include new initiatives to engage with major employers in our area, enhanced career guidance for those looking to enter insurance or financial planning and breaking the 1,500-membership barrier.

## Communication

Our preferred method of communication is now by e-mail and our website. However, more than one third of our members still specify 'no contact by email'. It is now possible to give permission to receive e-mails from your local Institute whilst not receiving those from the CII (if that's your preference). Log into Membership Up-date details on the CII website: [www.cii.co.uk](http://www.cii.co.uk) At the foot of the page, tick the 'sharing your data with local institutes' box. PLEASE! And don't forget you can follow us on twitter: go to @the\_iil.

## Education & CPD Support

The main purpose of the Institute is to support relevant education. We delivered a wide range of Continuing Professional Development (CPD) events during 2018/19. These were in a variety of formats - lunch time seminars, breakfast-time briefings and half-day and full-day workshops. The full list is in the table below. If you haven't attended one of our events, make a note to check our website each month: [www.localinstitutes.cii.co.uk/leicester](http://www.localinstitutes.cii.co.uk/leicester) Our events page also provides links to the CII's video and audio lectures. Other material is at the CII's Learning Content Hub.

## Examinations and Qualifications

We continue to be an examination centre. Written examinations were provided at Devonshire Place on London Road. In April 2018 (93 candidates took 11 subjects) and 1 October 2018 (95 candidates took 12 subjects). The number of candidates is reducing as the CII continues to switch to assessed work for general insurance (GI) qualifications. In April 2018, for the first time since examinations started in Leicester, there were no GI candidates at a sitting.

The centre for on-line examinations transferred this year from Loughborough back to Leicester. Examinations are now available most weeks at the Pitman Centre on King Street.

This year's prize-winners were:

Best Advanced Diploma in Insurance (ACII) – **Joseph Scarborough** of XL/Catlin: £150 and Papworth Plate.

Best Advanced Diploma in Financial Planning (APFS) – **Miles Sneath** of Milestone Wealth: £150.

Best Diploma in Insurance (Dip CII) - **Alisha Okuneye** of Momentum Broker Solutions: £100 and Mowatt Plate.

Best Diploma in Financial Planning (Dip PFS) - **Killian Kirkpatrick** of Mansion Park: £100.

Best Certificate in Insurance (Cert CII) - **Joanna Bentley** of Europcar: £100.

Best Certificate in Financial Services (Cert PFS) - **Alex Glenn** of PSA Financial Services: £100.

In addition, we award a cheque of £150 to every new Fellow. This year, **Robert Handford** of Hunter, Aitkenhead & Walker, **David Jones** of Chesterton House and **Alasdair Walker** of Hunter Aitkenhead & Walker all gained their Fellowship. They share the Mellor Plate.

Congratulations also to **Clare Kitchener** (BHIB) and **Emily Pearce** (Momentum) who gained Dip CII this year plus all those who achieved Certificate level.

## Sports & Social Events

On 6 July, soon after the longest day, a 1961 Bristol bus left Charles Street at 5.30pm. and headed for South Leicestershire. There members sampled the products of several local hostelrys in convivial company.

The Annual General Knowledge Quiz was held on 22 November at the University of Leicester, 22 teams competing. Glyn Hall Wealth triumphed, beating Turners into second place.

20 teams took part in the Annual Music Quiz at the University of Leicester on 21 March. The winners were Mattioli Woods, runner-up Aspects. The sponsor was RSA.

The 2019 five-a-side football tournament takes place on 9 April.

# Annual Report: 2018-2019



The Insurance  
Institute of Leicester  
Chartered Insurance Institute

## Next Generation

Our Young Professionals Group is now 'Next Generation'. Their last social event was a wine tasting at Veenoo in St Martin's. **Florence Dennis** attended the CII's mainstream annual Network Conference alongside Deputy President **Julie Rayson-Flynn**.

The winner of our 2018 High Achiever Award was **Kyle Tompkins** of BHIB (£125). Runner-Up was **Luke Perkins**, also of BHIB, (£75). Highly commended, £50 each, were **Andy Hall** (Brokerability) and **James Brooks** (BHIB). The prizes were presented at the annual dinner. Sponsors were Aspects and RSA.

## Local Employers

The CII centrally liaises with national firms. The biggest insurance employer in our area is Hastings Direct with around 1,000 staff, although we have only a handful of members there. This year, we have taken steps to engage more with our biggest local firms and this process will continue next year. When we design our programme, it's useful to know their needs. In return, we hope that they will encourage their staff to be active members of the Institute of Leicester. It's surprising how many staff working in the city or county are, knowingly or unknowingly, members of other institutes. RSA has generously sponsored this year's President.

## Charity Support

Our President's chosen charities this year were Leicester Royal Infirmary Neo-Natal Clinic and Insurance Charities. We donated £1,561 to the Clinic following our Dinner.

Charity Awareness day was on 26 June. Institute supporters sold cakes at several insurance offices where staff and employers donated over £336. Social events during the year raised another £348 – all for Insurance Charities.

Over the last five years, we have donated £4,840 to The Insurance Charities, as well as raising money for several other causes. Over the same period, Insurance Charities has awarded £36,854 to help insurance people in Leicester who needed help and support. The number of individuals or families helped each year has varied between one and seven.

## Annual Dinner

147 members and guests attended our 2018 Annual Dinner on Friday 9 November at the Marriott Hotel in Leicester. The Chief Executive of the CII, Sian Fisher, spoke about current challenges facing our industry. Following feedback, we again dispensed with the entertainment speaker to give more networking and social time. Our dinner sponsors were Aspect, AXA, BHIB, Ecclesiastical, AJ Gallagher, Larsen Howie, Momentum, RSA and Weightmans.

## Membership

We currently have 1,506 members. 825 (55%) are in general insurance (GI) and 683 (45%) are in personal finance. 234 members are Chartered – 'the gold standard'. We have 79 Fellows, 235 Associates, 458 Diplomas and 287 Certificates.

Our oldest member, **Kenneth Cotterill**, reached 100 last June. President **Chris Macleod**, accompanied by council members **Mal Fairhurst** and **Keith Torrance**, presented him with a specially designed certificate.

## Financial

We administer a budget of £44K. This is made up of a grant from CII (based on a percentage of membership subscriptions) sponsorship and member contributions for events. The grant from the CII is performance based. Our score this year was 95.5%. Most of our grant is spent on CPD activities. We finished the year with a small surplus, as was our target. If you would like to see our accounts in full, please email our Treasurer, David Hutchinson, at [Treasurer@theiil.org.uk](mailto:Treasurer@theiil.org.uk)

## Careers

We've attended careers events or demonstrated CII's 'Discover Risk' and 'Discover Fortunes' at National Citizen Service, Loughborough Grammar, Moat College, Lancaster Academy and City Rooms. Discover Risk and Fortunes are proving useful tools to engage with youngsters.

# Annual Report: 2018-2019



The Insurance  
Institute of Leicester  
Chartered Insurance Institute

## Regional & National

Leicester punches above its weight nationally. Our President has engaged directly with HO on several issues. The CII has adopted his initiative of issuing pins to Council members. Past President **Keith Torrance** has been awarded the CII's Exceptional Service Medal. This was for his work on the CII's Main Board, chairing the Regional Forum and compiling a brief history of the early days of the Institute. Past president **Janice Fielding** has been awarded the Distinguished Service Medal. For the past seven years she has been organising PFS CPD events both locally and regionally. During this period, PFS membership in Leicester has increased by 56%.

## AGM and Contact Information

If you would like to assist with any CPD or social events, invigilate at examinations or join our council please contact us: details on our website. Why not come along to our Annual General Meeting and meet us in person? It's at the Marriott hotel on Tuesday 23 April at 6pm. Since it's also St George's Day, we'll be having appropriate nibbles afterwards.

Date	Event & Venue	Topic	Sponsor	Attendance
7 Sept 2018	Lunchtime Seminar Mercure Grand	'Outlook for the UK Economy' Rosie Smith – East Midlands Agent for the Bank of England	Larsen Howie	95
3 Oct	Lunchtime Seminar Mercure Grand	'Cyber Liability Insurance' Matt Sumpter – UK Underwriting Director, CNA Hardy	BHIB	77
4 Oct	Full Day Workshop 104 New Walk	'AF7 Pension Transfers Workshops' Tracy Henson - Clear Sky Financial Consulting (CII Accredited Trainer)	-	6
7 Nov	Lunchtime Seminar Mercure Grand	'The Life of a Major Risk' Kevin Dinsdale (Regional Director) and Geraldine O'Donoghue (Fraud Investigator) - Crawfords	Gallagher	65
14 Nov	Breakfast Seminar – Hilton, Leicester	'Defined Benefit Transfer Value Analysis' John Corbyn – Pensions Expert - Old Mutual	-	41
5 Dec	Lunchtime Seminar Mercure Grand	'Tackling Stress at Work – a Modern Approach' Terry Streater – Oakwood Training and 'Insurance Charities' – Emma Bangar	Turners	36
9 Jan 2019	Lunchtime Seminar Mercure Hotel	'CCTV in Vehicles and the Benefits' Jason Dent – VUEcloud	Eastlake & Beachell	36
5 Feb	Full Day Seminar College Court	'Insurance Law - MO5' Rod Smith (Advanced CII Accredited Trainer)	-	12
6 Feb	Afternoon Seminar Marriott Hotel	'Ogden Tables' – 1 hour. 'Insurance Distribution Directive' – 1 hour. Alan Chandler Training	Ecclesiastical	30
6 Mar	Lunchtime Seminar Mercure Hotel	'How to calculate BI from an account executive and claim perspective' - Angus Osborne-White - Crawfords	Aspects	48
3 Apr	Lunchtime Seminar Mercure Hotel	'Blockchain' - Emily Clift and Rob Tanner - Kennedy's Solicitors	RSA	50
5 Apr	Brewin Dolphin 2 Colton Square	'AF7 – Pension Transfers - Revision Workshop' Steve Davis FCII, FPFS – CII Accredited Trainer	Brewin Dolphin	10

Your Council for 2018/19 was:

President: **Christopher Macleod** Cert CII (RSA)  
Deputy President: **Julie Rayson-Flynn** Cert CII (Brokerability)  
Treasurer: **David Hutchinson** Dip CII (Abaco)  
Secretary: **Mary Rogerson** (BHIB)  
Education/CPD: **Allison Marshall** (Aspects)  
PFS: **Janice Fielding** FCII, FPFs, Chartered (Fairstone)  
Membership: **Keith Torrance** FCII, DMS, MCMI, Chartered  
(Torrance Associates)  
Careers: **Sue Dexter** Cert CII (Brokerability)  
Charities: **Sue Banbury** Dip CII (University of Leicester)  
Dinner: **Rebecca Dougan** (RSA)  
Examinations: **Henryk Cynkar** BA (Hons) FCII, Chartered  
Sports/Social: **Deb Southwick** ACII, Chartered  
Diversity: **Bruce Teago** ACII, Chartered

Next Generation: **Florence Dennis** Cert CII  
(AJ Gallagher)  
Immediate Past President: **Laura Bee** LLB Hons  
(Mills & Reeve)  
**Andy Miller** Dip CII (Enable)  
**Grant Scott** ACII, Chartered (Perry Appleton)  
**Pete Willcocks** BA (Hons), MSc, FCII, Chartered  
(Larsen Howie)  
**Alasdair Walker** FPFs, Chartered (Hunter Aitkenhead  
Walker)  
**Martin Briers** MPhil, FCII, Chartered  
**Paul Thompson** (AXA PPP)  
**Rod Freeman** (Aspects)