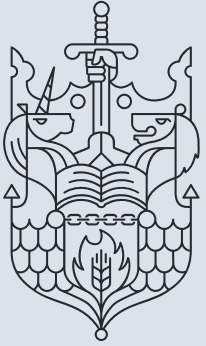


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Grant Scott, Vice President





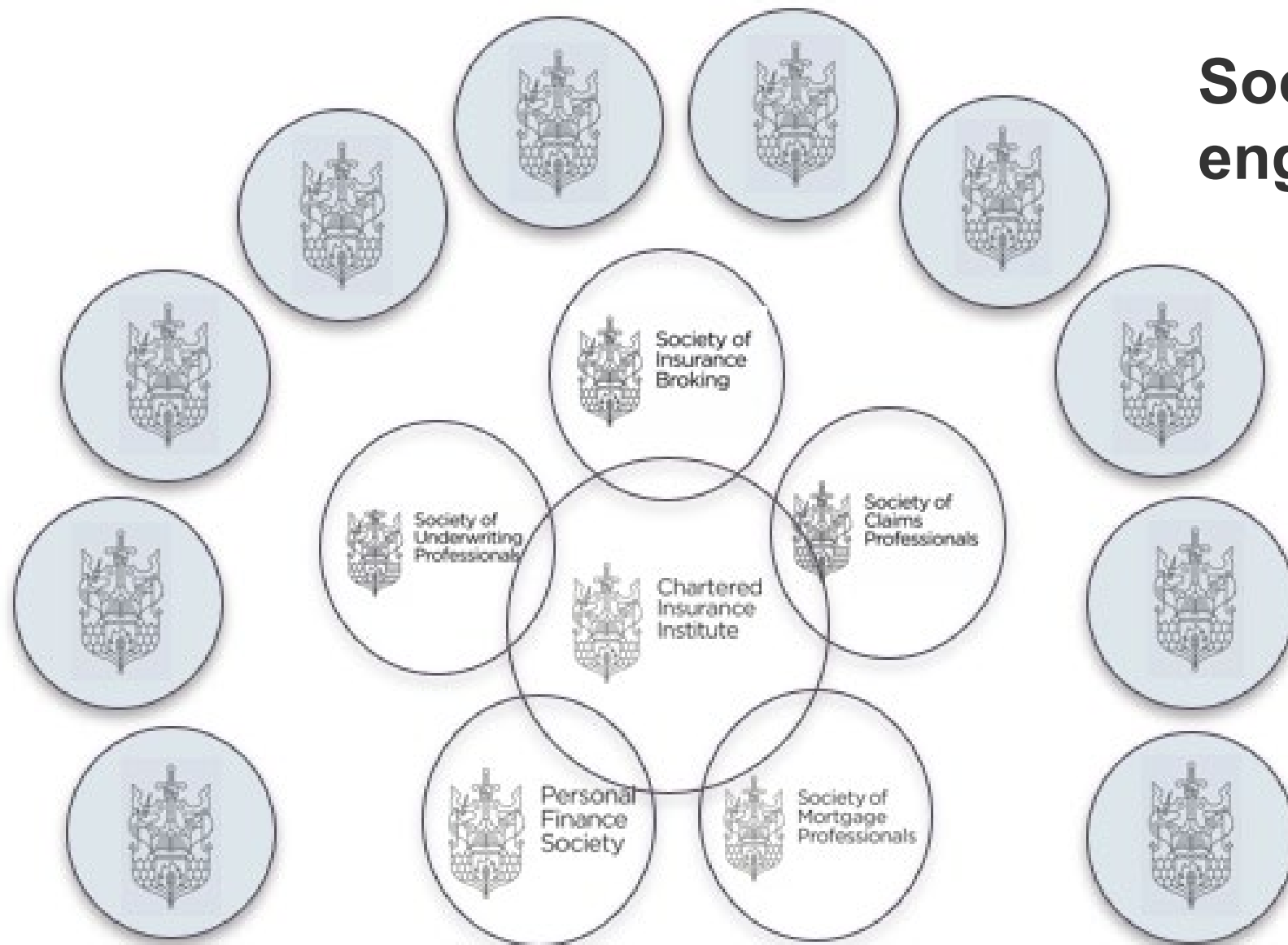
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Keith Richards



Societies - integrated engagement model



*Societies – Sector
Professional
Bodies
CII –
Qualifications
Awarding Body
LI's - Regional
support network*



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Member engagement through Societies

Established



Now launched



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#pfsFUTUREPROOF

The Personal Finance Society is soon
to be 15 years young!

LIA and Sofa merge

82% back Sofa-LIA merger to
become part of the Personal
Finance Society.

The LIA and Sofa announced their merger in July
with a view to offering a simpler, more cohesive
and more unified representation for financial
advisers. There will be LIA meetings between 7
September. Members of the LIA, Institute of
Association have voted in favour of a merger
with the Society of Financial Advisers, officials
have just announced.

John Ellis, public affairs director at the LIA, says
the membership voted with an 87% majority in
favour of the merger.

Area covered in mystery disappearances

2005

LIA and Sofa merge

82% back Sofa-LIA merger to become part of the Personal Finance Society.

The LIA and Sofa announced their merger in July with a view to offering a simpler, more cohesive and more influential representation for financial advisers. There will be 11 LIA meetings between 7 September. Members of the Life Insurance Association have voted in favour of a merger with the Society of Financial Advisers, officials have just announced.

John Ellis, public affairs director at the LIA, says the membership voted with an 87% majority in favour of the merger.

Area course in mystery diseases

To RSVP, contact: BRANDAN ORSATTI, GCI GROUP, BORSATTI@GCIGROUP.COM.



Blair wins again!



crazy Frog



David Cameron becomes Tory leader



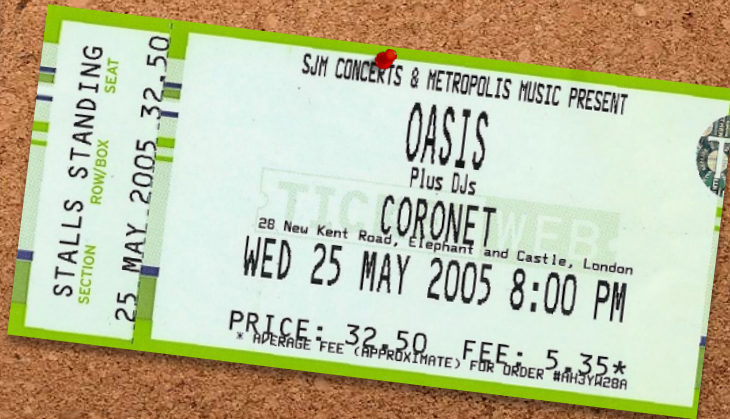
Civil Partnerships



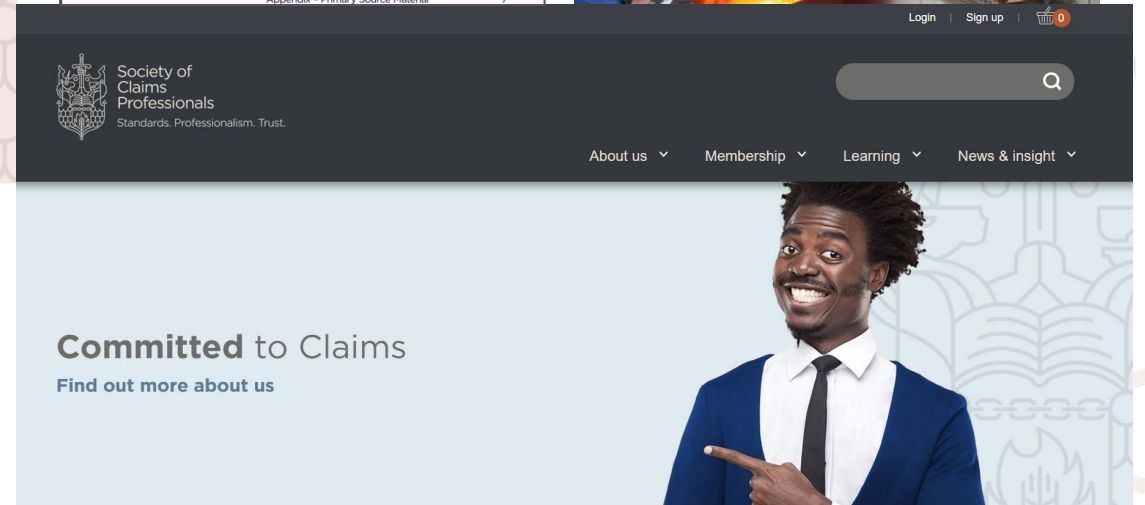
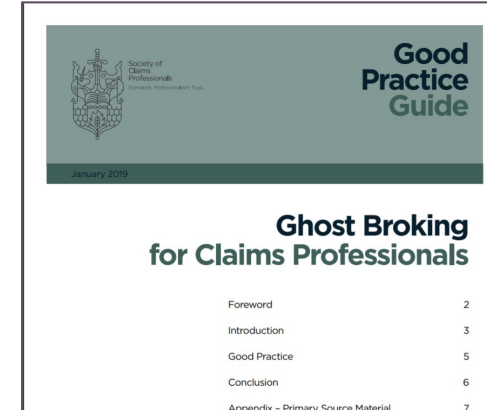
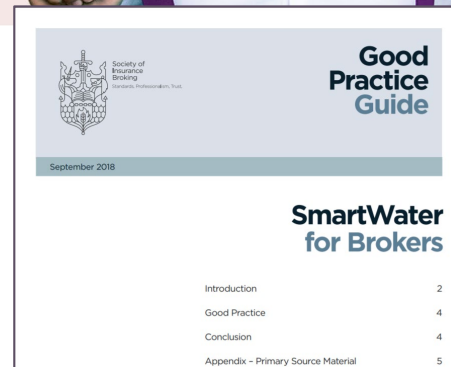
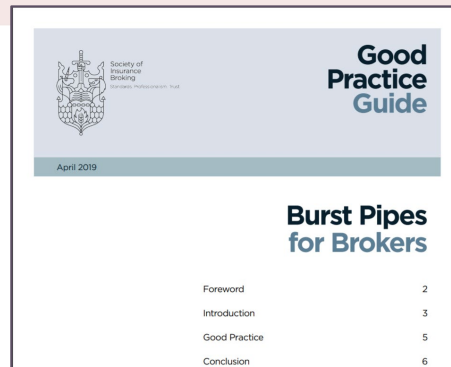
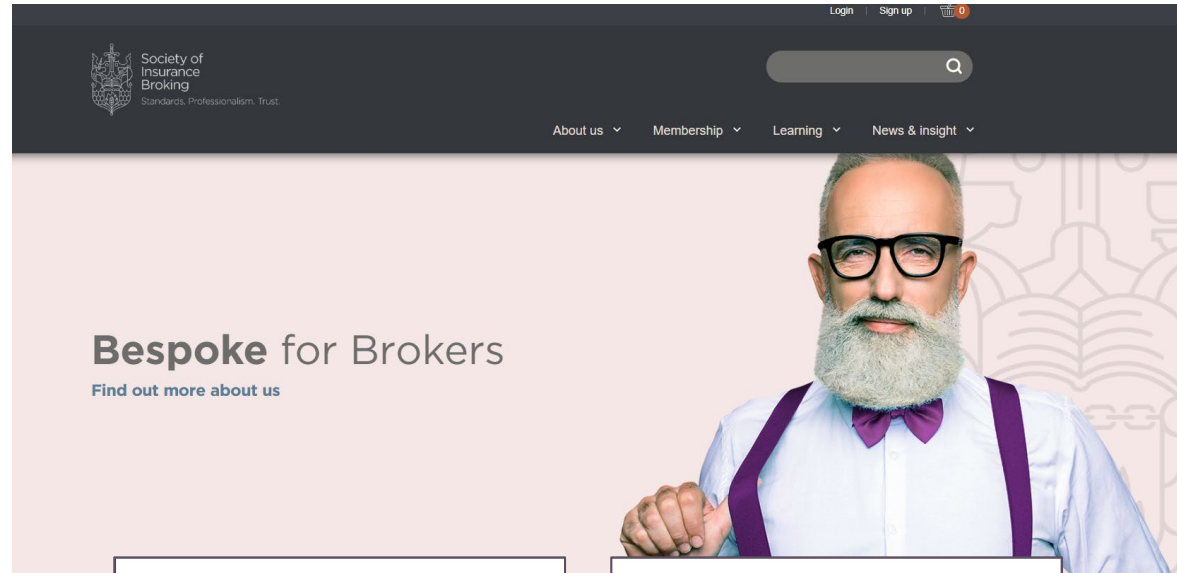
Turkey Twizzlers 'banned'

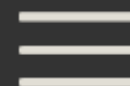


Charles and Camilla wed



Delivering relevant and engaging content





CPD PILOT: SHOWCASING GOOD PRACTICE

During the Autumn of 2018 we ran a series of conferences under a pilot scheme to deliver centralised CPD as a new, additional member engagement touchpoint.

INSTITUTES: LOCAL HEROES

When you become a member of the CII in the UK, the Channel Islands and the Isle of Man, you also become a member of a local institute, usually close to where you live or work.



Because
citizens

MoneyPlan

Financial guidance

citizens
advice

bono matters

FORCES
MoneyPlan

**Financial guidance
for armed forces
personnel and veterans**

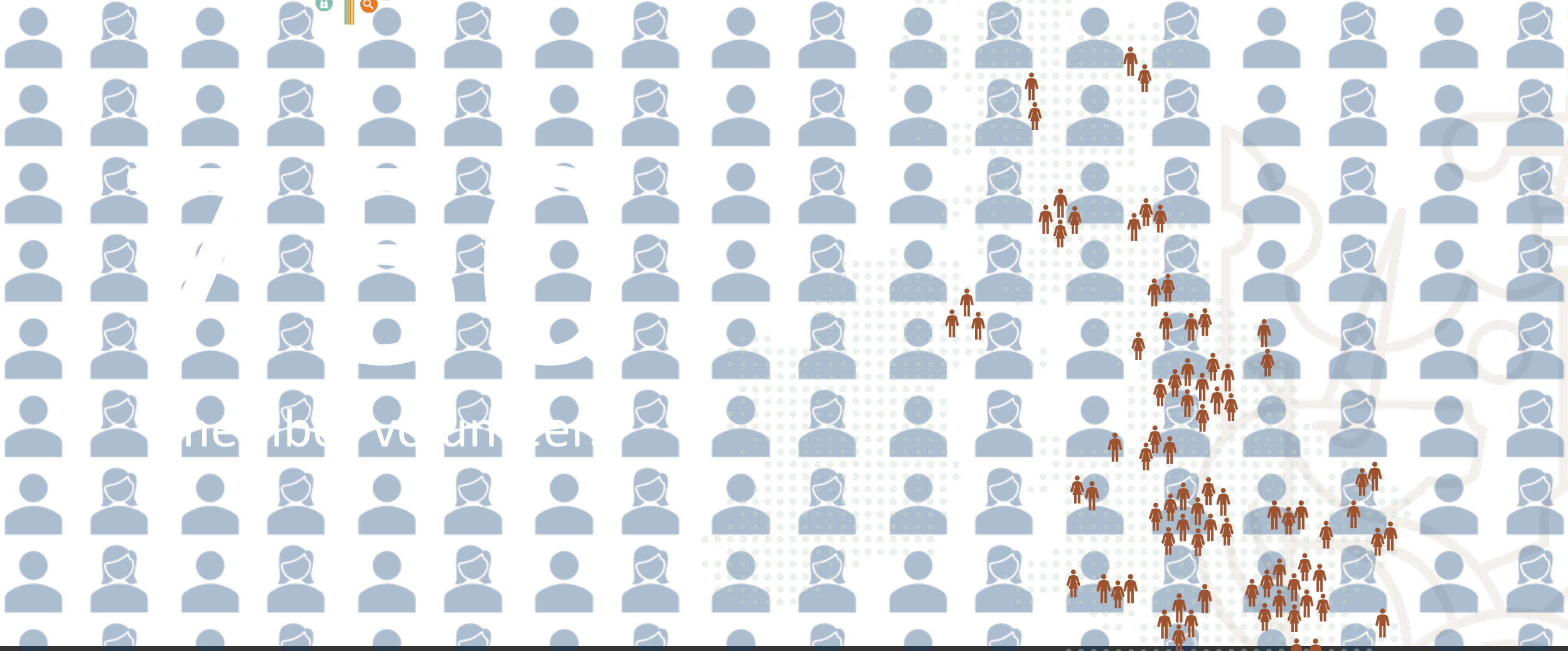
FORCES
MoneyPlan

#pfsFUTUREPROOF

MY PERSONAL FINANCE SKILLS









**REACHING A FURTHER
15,000 PUPILS**





Outstanding positive feedback
from all involved...





**it was useful to
show realistic
expectations
for us**

**enjoyed
interactive
nature of the
workshop**



Students



I have only positive feedback, the girls from the start to the end of the lesson were energetic and engaged

I can honestly say it was one of the best PSHE lessons from a visitor we had



Teachers

discover
rISK

discover
rISK

discover
rISK

discover
rISK

discover
rISK

Discover Risk Introduction video





**discover
fortunes**

Discover Fortunes!

Protection

Insurance against eg:
* Illness
* Job Loss
* Death

Pension

Putting money aside
for a relatively low
known and certain
return for:
* Income in old age



Client Risk Rating Card

Savings

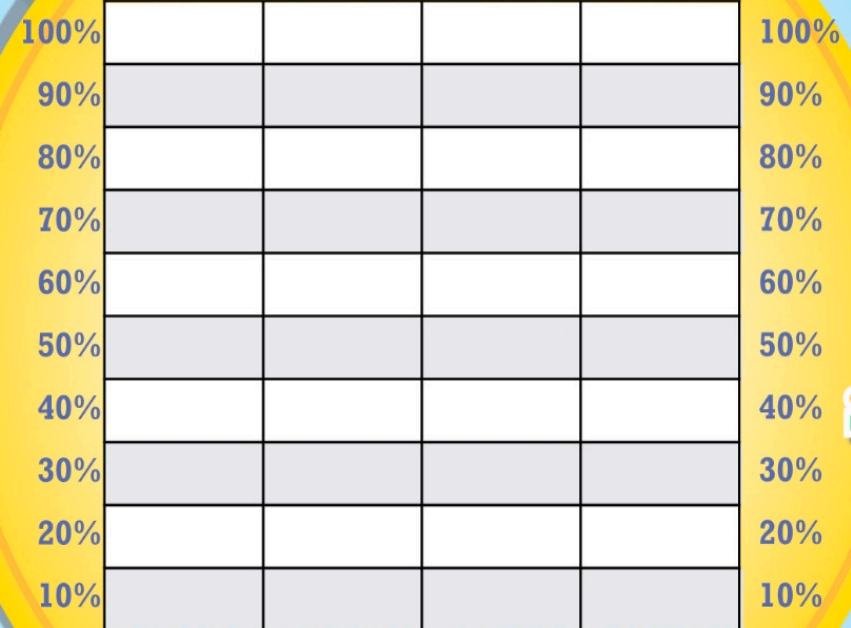
Putting money aside
for a relatively low
known and certain
return eg:
* School fees
* Vacation
* Unforeseen events!

Investments

Buying objects and
other assets for
a relatively high
unknown and uncertain
return eg:
* Second home
* Antiques
* Company shares

discover
fortunes

discover
fortunes



PROTECTION



PENSION



SAVINGS



INVESTMENT



DEFENDER

Solely focused on defending
what they have and put



SEEKER

Like to travel safe routes, but
willing to try out new paths



BALANCER

Sees strength in balancing
everything out.



EXPLORER

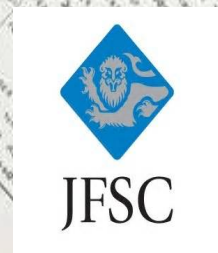
Keen to find new and different
opportunities

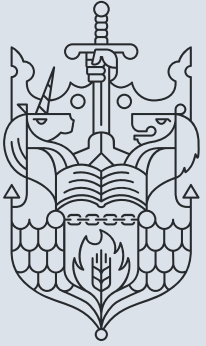


HUNTER

Fearless and take delight in
hunting far and wide for

Members – Policymakers - Public





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Local Institute National Forum

Lee Travis



Overview

- **New panel formed in 2019.**
- **Designed to recognise the excellent work and contributions from our members.**
- **Recognise the wider membership.**
- **Changes made for 2020 after listening to you.**



Panel Members

- **Lee Travis** – Chair, CII
- **Carly Knights** – Secretary, CII
- **Grant Scott** – Deputy Chair and LI Representative
- **David Irvine** – CII Representative
- **Ian Callaghan** – Nominations and Remunerations Representative
- **Kevin Hancock** – Society of Insurance Broking
- **Sue McCall** – Society of Claims Professionals
- **Karen Carlton** – Lay Member
- **Chris Hill** – Aviva Sponsor



2019	2020
	Distinguished Award
Unsung Hero of the Year	Outstanding Award
Initiative of the Year	Exceptional Award
Local Institute Council Member of the Year	Chartered Member of the Year
Chartered Member / Firm of the Year	Chartered Firm of the Year
New Professional of the Year	New Professional of the Year
The Allan Bridgewater Award for Excellence	The Allan Bridgewater Award for Excellence

Dates to note...

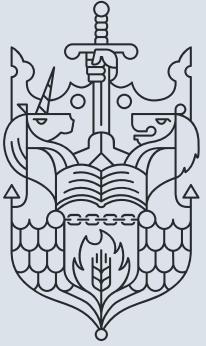
Wednesday 24th January 2020

Nominations open

Friday 17th April 2020

Nominations close





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John Bissell



Centre Management – New service

Impact and benefits for Local Institutes

- Improved consistency and standards of candidate experience across centres
- Improved use of technology in line with the changing landscape of exams moving from paper to on-screen
- Reducing burden of responsibility and risk for exam papers security
- Free up time from administration and invigilation (unless want to continue apply to supplier)
- Education Officers able focus on shaping learning & assessment locally and nationally rather than logistics (chairs, heating etc)
- Removal of exam centre performance criteria for grants

Local Institute Member Preferences

Two Issues and a Future Direction

1. Sort out Preferences and Declarations

- Clash between the preference centre and web-site declarations - simplify.
- Functions on the Edit User Profile should move to the Preference Centre

2. Default Corporate Sign-Ups to 'Yes'

- B2B customers should be set to Yes as it is a 'legitimate interest' - members join a membership organisation to take membership benefits (from both CII and LI)
- Direct new Corporate Sign-Up members to the web-site to complete the declarations and to manage their preferences

3. Future direction – CRM

- Currently LI's don't get LI member preferences (set up on the e-flyer system)
- Future opportunity to use CRM to allow LI better data and replace e-flyer (tbc)



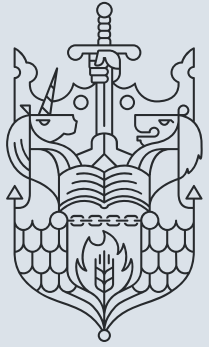
Driving the CII roadmap

The Learning and Assessment team are looking at what the future could hold for:

- Qualification change
- New topics and skills
- New assessment formats
- Professional development pathways
- Recognition & celebration (e.g. prizes!)

What are the best ways for Local Institutes to be involved?

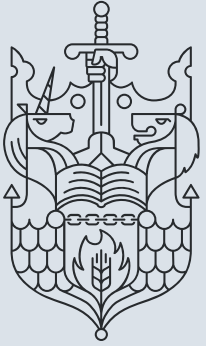




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Lunch





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Local Institute National Forum

Matt Hall





Local Institute National Forum

Steve Jenkins



- The Chartered Ethos
- Chartered Themes
- Advertising Chartered
- Working together - LI's & Chartered firms



Corporate Chartered



Our commitment to you

- Provide relevant learning to keep you at the forefront of the profession
- Develop thought leadership to showcase Chartered expertise
- Facilitate communities that support good practice
- Drive collaboration initiatives focused on social good
- Grow public awareness of Chartered

The Chartered Ethos



Nurturing
knowledge



Client
centricity



Serving
society

Your commitment to the public

- Commit to ongoing people development
- Align ethics and values
- Commit to customer-first approach
- Support initiatives that build public trust
- Contribute to the development of the profession
- Wear the Chartered badge with pride



Public trust in Chartered

Together we will drive public awareness that Chartered firms:

- Are accredited by a professional body
- Display a universal badge of professionalism
- Invest in people with knowledge appropriate to their role
- Have committed to an ethical code
- Exceed minimum standards
- Commit to good practice and good customer outcomes
- Give back to society



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Corporate Chartered

Over the years ahead, we are focusing on five priorities to ensure Corporate Chartered status remains relevant and works effectively for all stake holders



CI Ad Campaign

LinkedIn



Static Image

Scott Fynn, Jo Caley and 1 other connection follow Chartered Insurance Institute

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34,847 followers
Promoted

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The Chartered ethos: earning your trust
cli.co.uk

Like Comment Share



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@CIIGroup

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United Kingdom trends

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#InoueDonaire
Trending with: #AllTrophy, #Donairetrou, Inoue and Donaire
The Independent is Tweeting about this

2 - Trending
Ian Austin
6.1.1K Tweets

3 - Trending
#WBSS
19.1K Tweets


4 - Trending
Pelade

Carousel

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#InoueDonaire
Trending with: #AllTrophy, #Donairetrou, Inoue and Donaire
The Independent is Tweeting about this

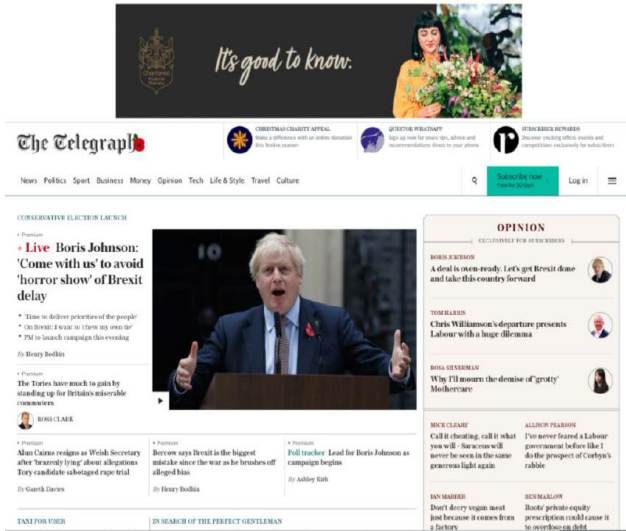
2 - Trending
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3 - Trending
Delph
Trending with: Barkley, No Greatish, Fabian Delph

4 - Trending
#WBSS
19.1K Tweets

The Telegraph

Mega Banner

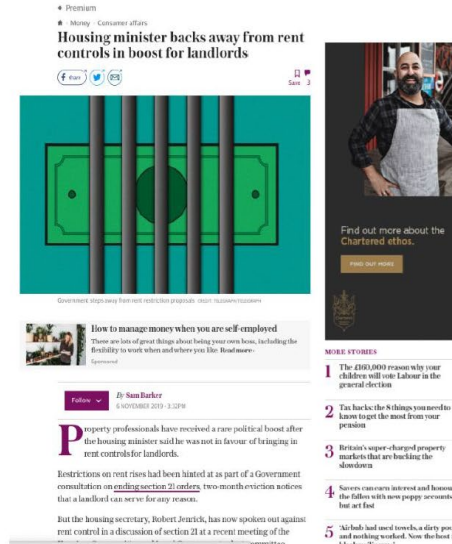


Tablet

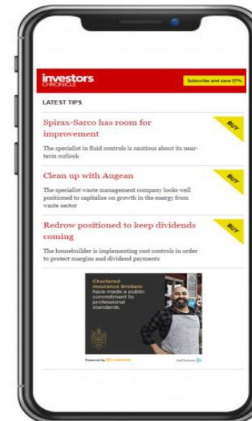
Full Screen Clickable Interstitials



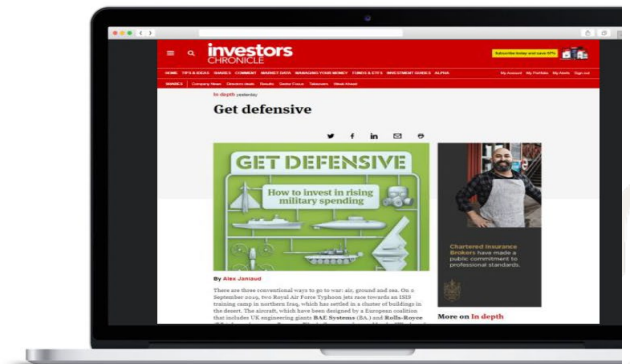
Half Page



Mobile MPU

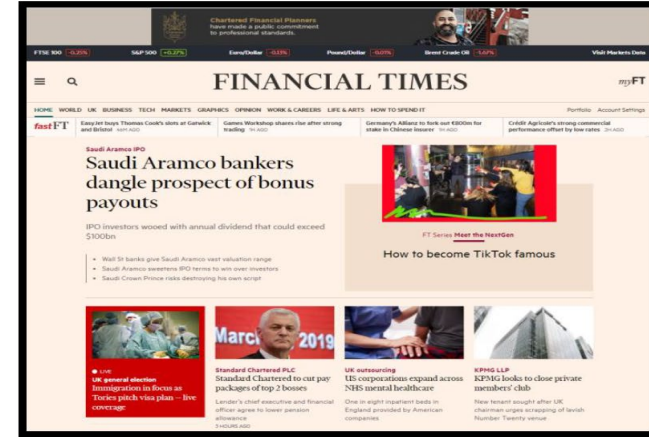


Half Page



FT FINANCIAL TIMES

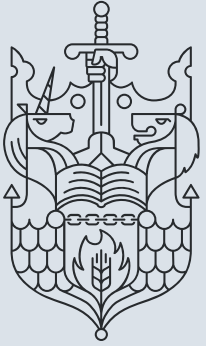
Leaderboard



Working together

- Mapping LI's to major Chartered firm locations
- Supporting CPD delivery at Chartered firms locally
- Sharing best practice
- New generation groups - networking





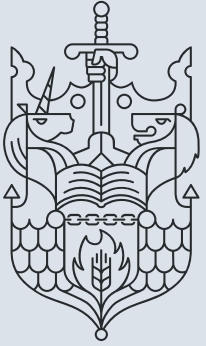
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Breakouts



Group 1	Group 2	Group 3	Group 4
Brett Batty Phil Bristow Ian Callaghan Brian Caruth	Ian Chapman Alex Clegg Chris Hall Robert Heaton Paula Hodson	Jamie Lewis George Maxwell Juliet Williams Richard Talbot-Jones	Debbie Mitchell Richard Salmon Richard Smith Callum Beaton





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Closing remarks

