



Personal
Finance
Society

Standards. Professionalism. Trust.

The Personal Finance Society Hants and Dorset Regional Committee 2020

Chairman: Kevin Forbes FPFS
Professional Qualifications Officer: Edward Morell DipPFS
Membership Officer: Matthew Cheek
New Professionals Officer: Hannah Pendlebury DipPFS
Education Outreach Ambassador: Elisabeth Noyce DipPFS
Chartered Champion (Hampshire): Tim Geoghegan FPFS
Chartered Champion (Dorset): Allan Cruse FPFS
Treasurer: Jenny Brown FPFS
Committee Support Officer: Julie Robinson FPFS
Committee Support Officer: Gareth Granger

27th April 2020

Dear Member,

Please see below the annual report from The Personal Finance Society Hants and Dorset Regional Committee to the Annual General Meeting of the Insurance Institute of Southampton, Friday 1st May 2020.

Since the last AGM on April 2nd 2019, the PFS Hants and Dorset Regional Committee have organised for its membership in both Hampshire and Dorset a total of 21 CPD pre-exam training days and a very successful Corporate Protection Day Conference in October 2019. Of these events 11 were hosted in Hampshire and 10 in Dorset. A total of 126 delegates attended the 21 exam workshops and 100 delegates attended the conference.

Unfortunately since March 16th 2020 due to the COVID-19 pandemic, we have had to curtail our extensively planned 2020 Q1 and Q2 programme of 14 events, of which only 3 were held prior to the lockdown. As a result the PFS Regional Committee have been planning a distance learning alternative for most of our events and this will be launched next week during the first week of May 2020.

The PFS Regional Committee also decided following their committee meeting in December 2019, to reduce the fees for all the RO, CF and JO exam courses in Q1 and Q2 2020 to just over £41 from £76.27 and increase the fees for the AF exam course to just over £81 from £76.27.

Yours sincerely,

Edward Morell
Professional Qualifications Officer, The Personal Finance Society Hants and Dorset Region
Deputy President, The Insurance Institute of Southampton

Pre-Exam Revision Day	Date (2019 unless stated)	Venue	No of delegates	Pre-Exam Revision Day	Date	Venue	No of delegates
RO4	Tuesday 4 th June	Shogun B/ness Centre, Funtley	5	AF5	Wednesday 3 rd April	Strategic Solutions, Poole	5
AF4 Day 1	Wednesday 4 th September	Shogun B/ness Centre, Funtley	9	RO2	Wednesday 1 st May	Strategic Solutions, Poole	11
AF7	Thursday 12 th September	Brooks MacDonald, Fareham	5	AF7	Monday 2 nd September	Vitality Stadium, Bournemouth	2
AF4 Day 2	Thursday 19 th September	Shogun B/ness Centre, Funtley	10	AF1 Day 1	Friday 6 th September	Vitality Stadium, Bournemouth	4
AF7	Friday 20 th September	Shogun B/ness Centre, Funtley	5	AF7	Friday 13 th September	Vitality Stadium, Bournemouth	5
RO6	Wednesday 25 th September	Brooks MacDonald, Fareham	6	AF1 Day 2	Tuesday 17 th September	Vitality Stadium, Bournemouth	5
Corporate Protection Day *	Friday 18 th October	Zurich Centre, Whiteley	100*	Corporate Protection Day *	Friday 18 th October	Zurich Centre, Whiteley	100*
AF5	Wednesday 2 nd October	Shogun B/ness Centre, Funtley	7	RO1	Thursday 24 th October	Vitality Stadium, Bournemouth	7
RO1	Thursday 14 th November	Shogun B/ness Centre, Funtley	2	RO3	Thursday 7 th November	Vitality Stadium, Bournemouth	5
RO2	Wednesday 11 th December	Shogun B/ness Centre, Funtley	3	RO2	Wednesday 27 th November	Vitality Stadium, Bournemouth	8
AF1 Day 1	Monday 9 th March 2020	Shogun B/ness Centre, Funtley	8	RO2	Thursday 27 th February 2020	Vitality Stadium, Bournemouth	6
				AF7	Wednesday 11 th March 2020	Investec, Bournemouth	8
Total			110	Total			116

**NB The Corporate Protection Day was a joint event, organised for both Hampshire and Dorset PFS members. An assumption of 50 members from Hampshire and 50 members from Dorset has been made.*