



The Insurance
Institute of London
Chartered Insurance Institute

Continuing Professional Development Certificate

Building a strong and sustainable financial planning profession

Date Wednesday 27 January 2021

Time 1.00pm - 2.00pm

Speaker Sarah Lord FPFS, President, Personal Finance Society

In this IIL financial services webinar, Sarah Lord discussed her theme for her year as President of the Personal Finance Society and shared her thoughts on how we continue to build a strong and sustainable profession.

By the end of this webinar members would have gained an insight into:

- Opportunities to encourage the next generation of financial planner
- The challenges and opportunities faced across the profession with the transition of a client relationship from the existing financial adviser/ planner to the next generation of planner
- The impact of Covid on adapting the business model for a strong and sustainable future



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