



The Insurance
Institute of
Leeds


Chartered Insurance Institute

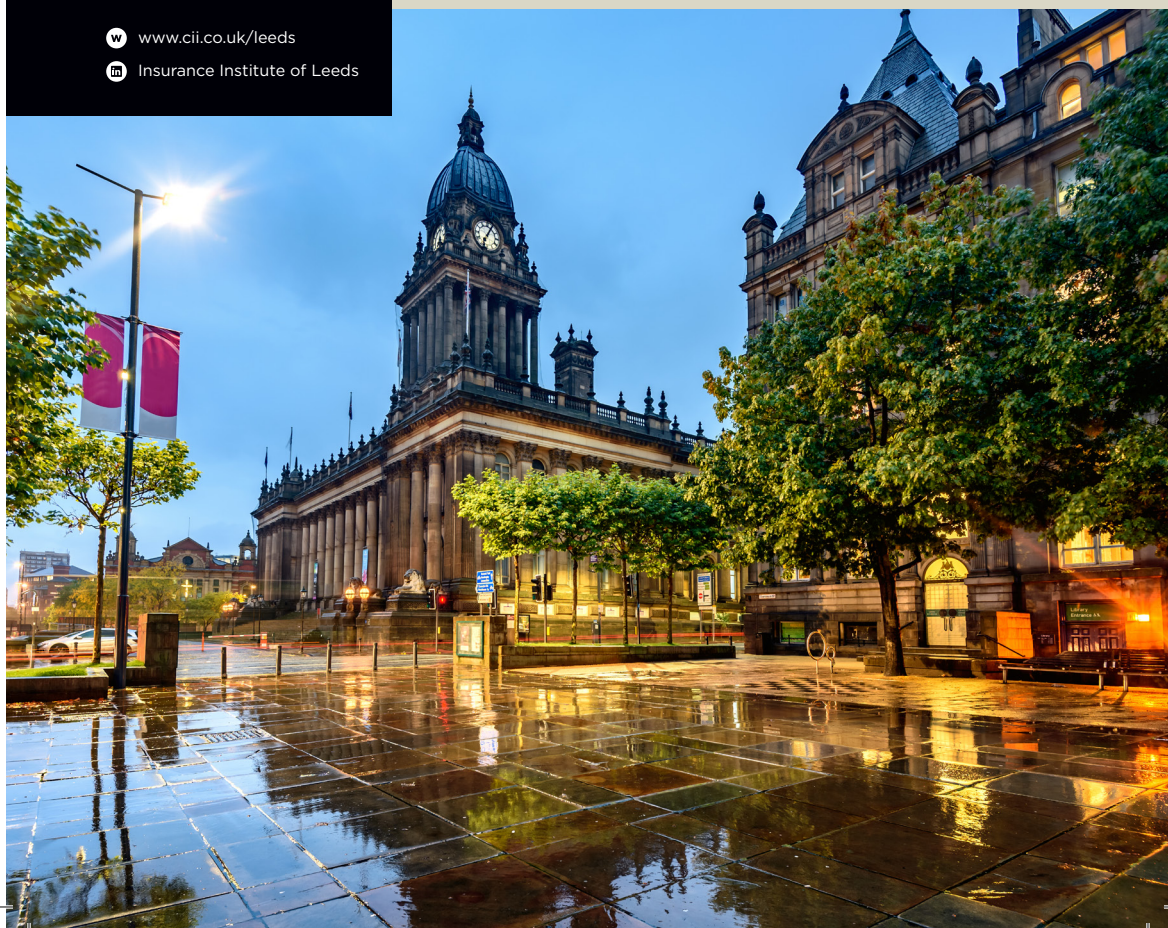
CoverNotes

WINTER 2020 / 21

Your guide to local career
development

 www.cii.co.uk/leeds

 Insurance Institute of Leeds



Welcome to Leeds Cover Notes

For many people 2020 has been a year to forget and it has certainly brought more than its fair share of tragedies, hardship and challenges. But I also want it to be a year to remember and celebrate how much people can overcome when they work together and refuse to let circumstances overwhelm them.

There have been so many stories of community support and hope in the last twelve months and I know that personally these have lifted my spirits when I've found myself feeling low. The Insurance Institute of Leeds acts as a hub for our members, and each moment of support or smile that we bring to even one person makes all the work that our volunteers put in worthwhile.

"I was so proud of our team for embracing the challenge of putting on such a successful new style of event"

In early October as we approached the date when our Annual Dinner should have taken place I decided

that we should still try and run a Virtual Dinner to make up in a small way for what we were missing. Massive thanks go to Bernard Thornton, Dinner Secretary and Karen Fothergill, Regional Engagement Executive, for making that idea a reality that turned into a great night on the 26th of November. As they say, 'Everything went alright on the night' and a great time had by all. I was so proud of our team for embracing the challenge of putting on such a successful new style of event.

On the Education front we have had more events for our members this year than ever before and we've got lots more planned for the next period. I'm excited to see what the future will bring as we can start to

consider a merged approach on events in the future (some events in person and some remaining virtual). Our members continue to strive for exam success despite the difficult circumstances for studying and sitting exams and we enjoyed celebrating our prize winners as part of our virtual dinner.

As always if anyone can spare a thought or a pound or two for our charities we're continuing to collect for the Insurance Charities and Touchstone and we're always grateful for any contribution that you can give: uk.virginmoneygiving.com/IILPresident



Melanie Jordan
PRESIDENT,
INSURANCE INSTITUTE
OF LEEDS

4003

MEMBERS

2422

INSURANCE
MEMBERS

1582

FINANCIAL
SERVICES
MEMBERS



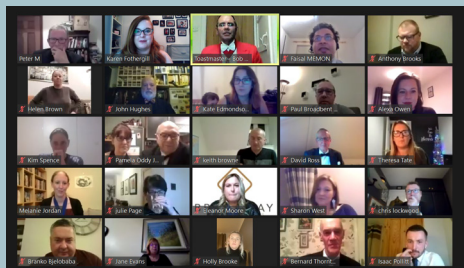
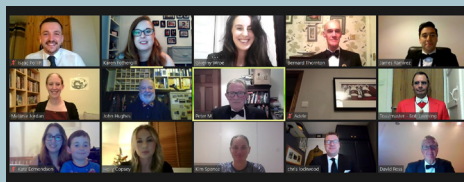
the insurance charities
for the things you can't insure against

Dinner Success

When Leeds President Melanie Jordan first suggested the idea of a virtual Annual Dinner, the response from Council was rather less than enthusiastic. Many members, involved as they were in regular Zoom meetings as part of their day job, were at first uninspired by the thought of spending 2 hours of their evening in what could be easily seen as yet another online conference.

However, Mel's enthusiasm for the idea was not to be denied. Gradually the prospect of getting members and friends to the kind of social get together that so many of us had been badly missing, together with raising much needed funds for our charities, began to appeal. The idea built up a momentum and within just 5 weeks we had everything arranged and ready to go.

The keys to success on the night were variety and brevity. The programme included speeches from the local and national Presidents, a charity speaker, games, a raffle, a motivational video from Paralympian Hannah Cockroft and of course, presentation of exam prizes to our winners, whose exceptional efforts might otherwise have gone unrecognised. All under the supervision of our regular toastmaster Bob Leeming, whose presence, in full regalia, added much to the occasion. No part of the proceedings took longer than 15 minutes and the ultimate sanction of the mute button was fortunately not required!



We included two 'breakout' sessions where our attendees could socialise and chat with each other in small, relaxed groups. A third, impromptu breakout apparently lasted long into the night...

The nature of the actual 'dinner' was of course, entirely down to individual participants, although it was noted that most appeared to be indulging more in liquid than solid refreshment. The absence of a dress code meant that participants were able to turn up in anything from dinner jackets and party frocks to pyjamas.

Despite our reservations and thanks to the tremendous support from our visitors from all over the UK, our raffle prize providers and charity donors, the event was a great success. Special thanks go to Regional Membership Executive, Karen Fothergill for all her help, especially with the technology.

Other than to charity, no money changed hands. Toastmaster Bob gave his services free of charge and as a result we were able to raise a total, including gift aid, of around £1500, split equally between Insurance Charities and the President's own choice, Touchstone.

Charities Shield

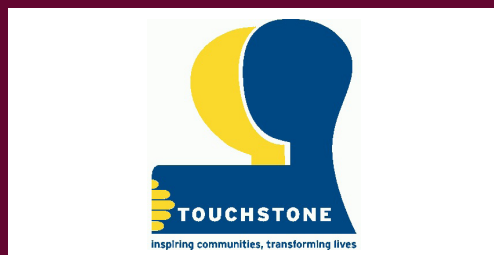
We've Done It Again!

The Insurance Institute of Leeds were jointly awarded the Centenary Charity Shield with the Insurance Institute of Dublin for the year ending 31st March 2019. The Centenary Charity Shield is awarded by 'The Insurance Charities' in recognition of efforts in fund-raising and publicising the charity over the course of the year.

Last September we were delighted to find out that we had again been awarded the Centenary Shield for the year ending 31st March 2020. Due to the situation with the Pandemic we will have to wait to receive a presentation of the shield, but it will be engraved with our details to celebrate our achievement.

To be awarded this honour for two years in a row truly reflects on the hard work of the charities team and particularly Michelle Gilmore who was our Charities Chair over those two years. The team have continued their fund-raising efforts over the last year continuing to raise money for charity via various events such as a virtual raffle and generally promoting our charities.

All money that we raise will be split 50 / 50 between The Insurance Charities and our President's chosen charity for the year Touchstone. We would love it if you could support us with any donations using our Virgin Giving page: uk.virginmoneygiving.com/IILPresident



"To be awarded this honour for two years in a row truly reflects on the hard work of the charities team"

Celebrating Exam Success

An important function of the Insurance Institute of Leeds is to ensure that individuals who distinguish themselves in the professional examinations of the CII and the PFS are duly recognised for their achievements.

This formal recognition is represented by 4 individual awards and we are delighted to say that pandemic restrictions have not halted our ability to make these awards. The winners in respect of each of the prize categories are selected from a short list of candidates, based upon a range of criteria in respect of their overall exam performances, by a small panel of members from the council of the IIL led by our Education Secretary – David Ross.

The awards and winners for this year are as follows:

The Insurance Institute of Leeds Advanced Financial Planning Certificate (AFPC) – *awarded for the best performance in the completion of the AFPC.*

AND THE WINNER IS

ANDREW CLARKE

The Insurance Institute of Leeds Certificate of Insurance Practice – *awarded for the best performance in the completion of the CIP.*

AND THE WINNER IS

FAISAL MEMON

The Trevor J Williamson Memorial Prize – *awarded for the best performance in the Diploma in Insurance*

AND THE WINNER IS

HELEN BROWN

The Bartlett Sugden Memorial Prize – *awarded for the best performance in the completion of the Advanced Diploma in Insurance (ACII)*

AND THE WINNER IS

CHRISTOPHER WALKER

We were also delighted to learn that one of our local members had distinguished themselves on a national level by being one of the top performers in the country. The award in question was The Worshipful Company of Insurers Prize in the Certificate in Insurance.

AND THE WINNER IS

HEATHER JACOMBS

We were delighted to be able to celebrate the achievements of our winners by making the awards at our virtual Annual Dinner on 26th November, with the winners being announced by our Exams Officer Peter Moran.

Our most sincere congratulations go to all the winners and we wish them well in their future careers.



DAVID ROSS ACII CIP
Education Secretary



Pay It Forward

One of the great things about 2020 was how people pulled together, taking some time to think of other people and make their lives a little bit easier. To celebrate this in November we asked our members to join in with our 'Pay it Forward Month'. There was a calendar of events with an action for each day encouraging everyone to give something back with Random Acts of Kindness to each other, ourselves, and our communities.

Some of the daily tasks were small but meaningful things like smiling at someone or putting your phone away while in company. Others encouraged us to think of others in our working lives by giving positive feedback or becoming a mentor. I know following along with the calendar made me re-think my actions on some days like ringing a friend instead of just texting or re-framing comments I was about to make in a more positive way.

I hope people enjoyed joining in and giving something back, I know that thinking about giving something back actually made me feel more positive as I followed the Calendar.

MELANIE JORDAN
President

Introduction to Careers in Insurance & Financial Planning

In February I was happy to be asked to be involved in a Careers video call with the CII and the University of Leeds, to hopefully convince students that a career in Insurance or Financial Planning was right for them. This was a different age group than I was used to after previously doing a careers day for some year 7's at a local school!

When I started working in insurance it was an accident, as for a lot of people, so it is great to speak to students and educate them on the breadth of roles the insurance world has, from a Broker to a Cyber Analyst, I didn't know what insurance was when I was their age, other than for my car! Our industry really does have a role for every skill set, with ever changing products, services and technology. We are really lucky how diverse and how far reaching our work goes and how many different businesses we get to learn about.

It was interesting to hear about other people's entrances into the market; from school; university; as a change of career later in life; there really is an opportunity to enhance your skills and gain experience in other areas, which has to be a good thing when you are looking at a future career whilst completing your degree.

The students asked lots of questions, and hopefully we were able to help! I have been contacted after the event for some advice from students who now would look to work in our industries once they graduate and hadn't thought about it as an option before.

Hopefully we can continue to hold events like this, and introduce some new talent into the Insurance and Financial Planning sector. If you want to join one in the future, please let me or another member of the Council know, it is definitely something that is enriching and an enjoyable part of my Council role and my role at J.M Glendinning.



Twelve Months On The Leeds Institute (Virtual) Council

The last twelve months have been difficult for everyone to say the least. However, there have been lots of positive moments in a year which has been incredibly challenging. The insurance industry adapted (and continue to adapt) at incredible speed to work life (and home life) in the midst of a pandemic and the Leeds CII Council and its members have shown amazing resilience and creativeness.

The year began with our first ever virtual AGM. Most of us are now accustomed to at least two Zoom and / or Teams calls a day but successfully hosting an AGM over the first month of a national lockdown (when video conferences were far from the everyday norm) was no mean feat! The year followed with virtual quiz nights, Pilates classes, race nights, numerous webinars, online exams and finally the annual virtual dinner which ran (via Zoom) without a single glitch.

Personally, I feel incredibly proud and honoured to have been able to be a part of the Leeds CII Council over the last year. The team show each other great support and whilst the role of a Council member is completely voluntary, everyone works hard to get the job done and provide events, networks and educational content for its members. I should add that it has also been a lot of fun and I've made some great friends and connections along the way.

If you would like to become part of the team or are interested in becoming a member of the Leeds CII Council, please don't hesitate to contact us at:

Leedsinstitute@cii.co.uk

GIVERNY WROE
Marketing Team Leader



Did You Get The Email?

We intend to keep you informed of all our forthcoming events via email. As with a growing number of organisations, email is our main method of communication. It is timely, highly cost-effective and helps to reduce our carbon footprint.

You can check and update your details online at **www.cii.co.uk/MyCII** or email **customer.serv@cii.co.uk** or call **+44 (0)20 8989 8464** with your CII PIN.

Forthcoming Events

We want to hear from you! Contact us at: **leedsinstitute@cii.co.uk** about any CPD, social or networking events you would like to see in the calendar. For further details and bookings visit: **www.cii.co.uk/leeds**