



Report

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Council Position: Co-opted member

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PFS Group Council Pre-AGM Report 10th February 2025

Event Review

During the previous year the Life & Pensions Society organised a number of in-person events including the following:

- Annual Conference
- Protection workshop
- Post-Budget Pension and Taxation seminars
- Pensions Planning for Women (Women in Finance event)
- Understanding the Gender Pay Gap
- Later-Life planning seminars
- Tax Efficient Investment seminars

These events were funded primarily from Sheffield CII, with some contribution from participants.

Members were also invited to participate in social events including the annual golf day, winter social event and other soft-networking events organised via Sheffield General Insurance CPD programme or wider Yorkshire CII.

Member Feedback

Based on feedback received members have been very satisfied with the output provided by the Life & Pensions Society, which continues to strive to provide high quality, unbiased content at regular intervals.





Feedback from the Autumn Conference is summarised below, the committee take note of all comments and incorporate these into our planning of future events.

Event feedback

Event title	2024 PFS-Member Annual Conference					
Event date	17/10/2024 09:00:00					
Venue	Royal Victoria, Crowne Plaza, Sheffield					
	1	2	3	4	Total responses	% rating 3 and 4
Event learning objectives were clearly stated		3	32	57	92	97%
Event met the stated learning objectives		1	31	60	92	99%
Location of the venue		6	29	57	92	93%
Venue facilities and catering		6	36	50	92	93%
The overall event		3	33	56	92	97%

What events or topics would be of interest to you in the future?







Member outreach

We communicate with members via a number of sources including e-flyer, website, Linkedin and through the locally-maintained database. The use of all these methods in combination appears to be an effective means of information dispersal.

Education update

There was no local provision of exam training during the year in review, however we have circulated details of subsidised being provided by other Local Institutes and externally, as arising.

Committee membership

We have recently reached out to attendees of L&P-organised events to request additional support and are actively looking to add to the committee to ensure effective running of the group on an ongoing basis.

Owen Wright - Chair: Sheffield Cll: Life & Pensions Society