

Annual Report: 2024-2025



The Insurance
Institute of Leicester
Chartered Insurance Institute

Introduction

As we approach our Annual General Meeting and change of President, this report looks back on our business year. At the start of his year, our President **Brian Brookes Dip CII** said he particularly wanted to increase engagement with the schools and universities so more students chose insurance as a career; Leicester CII's contribution to reducing the skills shortage in the industry. We have, for the first time, organised a full careers day for invited school students across the county, scheduled for July. They will learn about both general insurance and financial planning as well as receiving the customary 'merch'. Many thanks to **Mattioli Woods** for the use of their premises.

Brian comes to the role with experience; he's the first non-consecutive President in our 110-year history. That may or may not have been a factor in our achieving a 100% rating in our annual assessment by the CII. (Our previous assessment was 'only' 98%.)

Continuing Professional Development

We have continued our programme of CPD events. Our feedback is that members prefer the convenience of virtual attendance at one-hour webinars combined with occasional face-to-face attendance at meatier events.

An event that attracted particular interest was our full-day Artificial Intelligence for Non-Techies at Winstanley House, organised by **Pardeep Gill**. We knew we'd made a good choice of hot topic when the event sold out in a day. Unfortunately, our planned event linking a Bank of England update with another major speaker had to be postponed due to the unavailability of the BoE Agent. It's being rescheduled for the autumn. Personal Finance Society (PFS) members have been able to attend F2F events at the National Space Centre. There's more about that in our PFS report below.

For CPD webinars, our aim has been to provide a mix of sessions covering general insurance technical subjects, financial planning technical subjects, personal & managerial skills and wellness. A full list of the events we've provided is in the table at the end of this report. We continue to provide webinars at lunchtime so members can 'lunch and learn' - with cameras off if they wish, so others don't have to watch anyone eating.

We still circulate weekly to members who want it – and to members at 36 other Local Institutes - a list of forthcoming CPD webinars provided by every Institute in the country. If you want to receive this, please contact our Education Secretary, details [here](#).

Examinations

It has been the practice for over a hundred years that CII Local Institutes provide free exam training for CII qualifications to members who don't have access to a scheme run by their employer. Leicester has been proud to continue that tradition. We and a number of other institutes are working with Intuition Training, which provides training at Advanced Diploma (ACII), Diploma and Certificate level. Feedback from Leicester members on the various courses has been good.

In the past, we have sponsored full courses. The Intuition model is different. It offers individual subjects on a stand-alone basis. So if you stopped studying a while ago but just need one or two subjects to complete a qualification, this could be the scheme for you. Or if you think that now is the time to improve your career prospects but don't have access to an apprenticeship scheme, we can probably help. Please contact our Education Secretary [here](#).

We also continue to provide assistance to PFS members taking Dip PFS subjects. In conjunction with East Midlands PFS, we work with training provider Bespoke Technical Solutions (BTS).

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Prize-Winners

We give two prizes for best performance in examinations. This year's winners are:

Best performance at Advanced Diploma (Associateship) – Ana Gomes-Freire ACII of Markel Insurance. Ana is a relative newcomer to insurance but has quickly passed her exams with a high average mark, including one subject with distinction. Her prize was £500.

Best performance at Diploma – Risha Babu Dip CII of Movo Insurance Brokers. Risha passed her seven exams with three distinctions, the only one in her cohort to do so in the year. Her prize was £250.



Risha Babu (left) and Ana Gomes-Freire receiving their prize, certificate and a bottle of champagne (each) from President Brian Brookes. We award £200 to every new Fellow. On the right, Tobias Colton receives his Fellowship Certificate, award and a bottle of champagne.

New Designations

Since our last report, **Catherine Falch-Wilson** (WBR Group) and **Ravi Prema** (Prema FS) have achieved Fellowship of the Personal Finance Society.

Congratulations also to all others who have gained a new designation:

Associate of the PFS (APFS):

David Archer (Alexander Grace), **Stephanie Tennant** (Accelerate), **Jacob Siara** (Handford, Aitkenhead & Walker), **Lauren Herrick** (Fairstone) and **Nicholas Rogers** (Schroders).

Diploma of CII:

Risha Babu (Movo), **Christopher Macleod** (NIG), **Stacey Harris** (Momentum), **Jonah McSweeney** (Aviva), **Sharron Dean** (BHIB), **Thomas Mulligan** (Albany), **Paul Winkless** (Berkeley), **Harry Brearley** (Adler Fairways), **Alexander Reusze** (Aon), **Rishi Khokani** (Munich Re) and **Hayley Smith-Tarr** (Hastings Direct).

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Diploma of PFS:

Kelly Chapman (Mattioli Woods), **Rosie Haley** (Furnley House), **Esme Rennocks** (Rennocks FP), **Jaspal Singh** (Mattioli Woods), **Abbie Talbot** (First Service), **Hakeem Okuwobi** (Fairstone), **Daniel Humphreys** (Cotswold), **Nilay Joshi** (Mattioli Woods), **Emma Wilson** (Eastlake & Beachell), **Umair Novsarka** (Furnley House), **Matthew Lawrie** (Mattioli Woods), **Gideon Bramble** (Mattioli Woods), **Mohamed Panjwani** (Mattioli Woods), **Shane Stodd** (Mattioli Woods), **Dean Wilkinson** (Mattioli Woods), **Harrison Barnes** (PSA), **Daniel Carter**, **William Hextall** (PwC), **Rajivkumar Soni** (Mattioli Woods), **Giuseppina Turi** (Mattioli Woods), **Matthew Boffey** (Westminster Wealth), **James Franklin**, **Cameron Rueppel** (Mattioli Woods), **Emma Raine** (Boolers) and **Vasanthan Gnanasegaran** (Radiant).

Congratulations also to all of our new Certificate and Award holders, too numerous to mention.

Field Trips

For a variety of reasons, trips planned during the past year were postponed. However, look out for announcements about trips to the Royal Courts of Justice & Lloyd's, the JCB factory at Uttoxeter and the Building Research Establishment at Watford.

Sports & Social

Your Local Institute isn't just about education. We like to provide social events too. And occasionally, we can combine the two. Our Treasure Hunt on Foot around the city centre never fails to inform participants about the history and architecture of Leicester. Wygston's House on Applegate claims to be the oldest house in Leicester, dating from the 15th century. Roger Wygston, a wool merchant, Mayor of Leicester in 1472 and MP is said to have lived in the timber-framed house. Since it's now a public house and restaurant, it was an ideal starting and finishing point for our event on a beautiful September evening. In a close contest, **Boolers** came out ahead of **Arch** by just half a point. The clues were generated by **Pardeep Gill** and **Tom Mulligan** with a little help from AI – an excellent combination of history and new technology. Many thanks to sponsors **Arch Insurance**.



*The teams from
Boolers (left) and
Arch (right) with
President Brian
Brookes and
co-organiser
Pardeep Gill*



Our 5-a-side football tournament last May was our biggest and best yet, attracting over 80 players to the Goals Centre on Wakerley Road. Two groups of six teams saw tight games go to the wire, with only goal difference separating sides who progressed to the semi-finals. One of the semi-finals went to penalties before a tight final was played out under the lights. Three hours after the tournament's first whistle, **Forbes** Brokers were eventually beaten by **Wattam Kirby Mee** who saw out the game to win the crown for 2024. Thanks to **AXA** for sponsoring such a fantastic night and donating two Liverpool training shirts which raised a total of £150 at auction. Good work by **Callum Shevas** and his team organising the event.

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The victorious WKM team with their Shield and the proud new owner of an auctioned Liverpool shirt.



This year's competition will be on 20 May. Have you organised a team yet? Sorry, it's still men only.

Charity

The charity we supported this year is Scleroderma & Raynaud's UK (SRUK), a cause in which our President is actively involved. Scleroderma sufferers have an overactive immune system; the body attacks its own healthy tissues. Whilst a milder version of the disease mainly affects the skin, systemic scleroderma can attack internal organs such as the heart, lungs or kidneys as well, with severe consequences. Two representatives from SRUK attended our Annual Dinner to tell us more about the disease and what the charity does to help sufferers. We raised £2,501 on the night. As the charity said: 'a brilliant result'.

As you may have seen in the insurance press, Insurance Charities has had a major name change. It's now The Insurance Charity. Its funds are in a healthy state - £38M, up from £36M last year. Leicester currently has ten beneficiaries being supported by the charity. The financial value of that support in 2024 was £36,953 and nearly all of this amount has been to help beneficiaries on a day-to-day basis.

A new CEO, Helen Sansom, has been appointed with effect from 10 March 2025, following the retirement of Annali-Joy Thornicroft after 40 years' service with the charity. We encourage everyone to spread the word about The Insurance Charity as it offers real support for both current and former insurance employees, and their dependants. If you are working, or have worked in the insurance industry, have experienced misfortune and are suffering financial hardship, it may be able to help.

Details are on the website [here](#) and there is a simple online application. All information is confidential. Our Leicester Insurance Charity representative is **Janice Fielding**; please contact her [here](#) if you would like more information. The Insurance Charity Awareness Week is 23 – 27 June.

Next Gen

An informal survey amongst our Next Gen members has suggested that focussing on social events during the year is the preferred option. On the educational front, the mainstream events we provide for all members work equally well for Next Gen. Our Next Gen Chair, **Amy Godson**, has been busy meeting her group's social expectations.

Billed as new-age darts meeting classic pub vibes, a lively evening was held on 14 November at O'Neill's. The winner was **Sam Dalby** of Towergate ahead of **Amy Godson** (Howden) and **Kass Dita** (Brokerbility). This was quickly followed by a mingle and jingle quiz at the Cosy Club on 2 December where our President doubled as quizmaster. **Berkeley** emerged as the winning team and £100 was raised for Leicester South Foodbank.

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The next planned event is a ten-pin bowling evening at Roxy Ballroom on 8 May. If you are under 35, why not come along and meet new colleagues? If you don't like attending on your own, bring a friend who works in insurance or financial planning. Details and booking arrangements will be advertised shortly.



Finally, there should be mention of the Next Gen table at the Annual Dinner (pictured above); by common consent, the liveliest table of the night although not all were familiar with the music played by the rock covers band.

Careers

We customarily visit schools and colleges to explain (and sell?) the merits of a career in insurance or financial planning, and there have been such visits this year. However, we have reviewed the system and believe there's more to be achieved by holding a full-day event centrally for selected students. As mentioned in the introduction to this report, plans for the event are close to finalisation. 40 students will attend the Mattioli Woods building – probably the first time many have been in a top-class office. There, they will receive presentations on general insurance and financial planning, including interactive involvement and use of CII material such as Discover Risk and Discover Fortune. We also still use the CII's 'Insurance Influencer' video featuring our own **Flo Dennis**; click [here](#). **Tom Mulligan** and **Amy Godson** will be announcing the full details shortly.

One hoped-for benefit of hosting and focusing on named students is that we might be able to better measure the success of the exercise, compared to attending a standard careers fair.

Personal Finance Society

Our local PFS Rep **Janice Fielding** also sits on the PFS East Midlands Committee which covers Leicester, Nottingham, Derby and Northampton. She arranges local CPD events for Leicester members and, in conjunction with the PFS committee, CPD events for the wider area; this is in addition to the National events supported by PFS.

In conjunction with the Regional Committee, Leicester has been host to several face-to-face workshops at the National Space Centre, covering topics relating to inter-personal skills for Financial Advisers and the rise of AI

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technology in financial services. In addition, webinars on technical topics covering Workplace Pensions, the use of Trusts and a Tax Planning Case Study were very well attended. The Regional Committee receives a grant from PFS HO to fund events.

Leicester CII has continued to liaise with Bespoke Training Solutions (BTS) to provide subsidised examination training at Diploma Level. Our scheme has been adopted elsewhere.

Leicester also hosted a PFS national event last June at The Kingpower Stadium. Specialist speakers Sarah Adekola, Carla Brown, Derek Mills and Tony Wickenden provided insights into Technology, Artificial Intelligence, Sustainability and the Budget.

Janice Fielding attended the PFS AGM in Manchester last November. As has been reported, relations nationally between the PFS and CII have not been as harmonious as they could be. Fortunately, at local level, collaboration is much more successful.

Since 46% of our members are from financial services, we are keen to increase PFS representation on Council and encourage our PFS members to let us know what CPD they would like to see locally. If you would like to know more about joining the Leicester CII Council as a PFS member or have some CPD suggestions, please contact Janice Fielding, details [here](#).

Janice is the Qualifications Officer for the PFS Regional Committee alongside Leicester member **Joy Zhuoying** who is a Chartered Champion. **Liz Wesson** (Nottingham) has taken over as Chair. The full committee is [here](#). The greater autonomy of the PFS Regional committees increases the need for better liaison with Local Institutes. Leicester is leading the way nationally in improving protocols

Annual Dinner

There was a good attendance of 202 at our 108th Annual Dinner on 1 November, up 20% on the previous year. The split was roughly one-third Leicester members, one-third members of other Institutes and one-third other guests. The response to the toast to our guests was given by **Phil Hayes**, Vice President of Peterborough Institute. It's fortunate that the Marriott hotel is well away from neighbouring buildings since the after-dinner entertainment was provided by rock-covers band Stone Punch.

Thanks were given to our Dinner Committee of **Mary Rogerson, Sue Hull and Julie Rayson-Lee**; also to our sponsors: **Allianz, AXA, Brokerbilty, Clear, Ecclesiastical, Fairstone, Idex, Lorega and PIB**.

A date for your diary; this year's dinner is on Friday 31st October. Will there be a Halloween theme?

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L to R. Kris Vind (President Birmingham II), Claire Kitchinson (Deputy President Nottingham II), Jenni Wheatley (President Lincoln II), Robert Weald (President II Peterborough), Ruth Stanger (SRUK), Hemal Patel (President II Northampton), Helen & Brian Brookes, Michelle South, Gemma Cornwell (SRUK), Florence Dennis (Chair East Midlands BIBA) and Danielle Ashmore (President II Coventry).

Regional/National

Our Deputy President, **Michelle South**, and Education Committee Member, **Pardeep Gill**, attended the CII's National Network Conference in Cheshire in June. The Professional Map was discussed as being central to the CII's propositions but not yet having realised its full potential. The corporate team wants to co-operate in engaging with businesses to promote the benefits of CII. We have subsequently invited them to attend a Council meeting at Leicester to elaborate.

Our delegate to Regional, **Keith Torrance**, has attended the four meetings held in the last year. Our Regional Delegate to the Local Institute National Forum is **Juliet Williams** of Nottingham. A majority of the items Juliet has taken to National Forum were raised initially by us at Leicester. We punch above our weight within the CII.

Communications

As we all know, communications is increasingly important in this social media world. Those of you who use social media to promote your business as well as personal life know how time consuming it is. So thanks to our Comms Officer **Flo Dennis** who has registered another increase in our Linked-In followers, now 646 – an impressive achievement from a 2022 launch. To keep on top of all the different media, our comms has now expanded to a committee of three. Watch out for polls and other innovations in the coming year.

Are the details held by CII about you up to date? We ask that everyone checks once a year. Why not now? Details of how to do so are in the next paragraph.

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Email continues to be an important medium for announcing events. Around two thirds of our members allow emails from us. More negatively, one third of you don't. We'd ask you to reconsider. We don't run that many events and we don't sell products or services. If you haven't seen a mail from 'Leicester CII' recently, please check your preferences stored on the CII's website. Click [here](#) and log in. On the left side of the initial dashboard page, click on 'communication preferences'. Our particular request is that you click to receive 'News, event and CPD content from my Local Institute'; although, of course, we wouldn't want to discourage you from receiving communications from CII Corporate as well. If you don't want to receive communications from us, please consider diarising to check our [website](#) fortnightly or monthly for events and news.

You might think that all CII Local Institutes report to their members in similar format to this. It turns out that's not the case. Many don't report to members at all – an odd situation for a member organisation that should be accounting for how it has spent the share of its members' subscriptions that it has received in grants from CII. We were delighted to hear that CII Board Chair **Dr Helen Phillips** had seen last year's Leicester report and commended it as a model for other Institutes.

Membership

We currently have 1,616 members. Membership numbers have been static in recent years. We have 50% more members than 20 years ago, 23% more than 10 years ago but only 2½% more than five years ago. However, many local CII institutes now have fewer members than pre-pandemic so we are doing better than the average.

54% of membership is general insurance (GI) and 46% financial services (FS). The pinnacle is chartered. We have 234 chartered members. That's 15% of total membership, so scope for more to join them. There's more detail in the table below.

	GI	FS	Total		
Fellow	14	56	70	Financial Planners	126
Associate	123	75	198	Insurance Brokers	45
Diploma	58	445	503	Insurance Practitioners	37
Certificate	300	37	337	Insurers	23
Not yet qualified	382	126	508	Risk Managers	2
Total	877	739	1616	Insurance Underwriting Agent	1
				Total Chartered	234

Finance

Our financial year is the calendar year. Our main source of income is grant money from CII. We have received both an annual grant and a special grant in the last 12 months. Our Annual Dinner again sustained a loss. There has been a delay in the auditing of our 2024 accounts. When the Treasurer's report and audited accounts are available, they will be uploaded to our website [here](#) and this annual report will be updated.

Annual General Meeting

The AGM will be held on Wednesday 23 April, 6pm, at the Leicester Marriott. Unless you are already committed to St George's Day celebrations elsewhere, why not come along? It's good to get feedback from members on what has been successful and what we could do better. The meeting is usually around 30 minutes followed by an opportunity to meet council members informally. To help administration and catering, we ask that those attending book in advance if possible; click [here](#). The Report and Accounts will be presented for approval and incoming President-

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Designate **Michelle South** Cert CII will outline her plans for her Presidential year with particular reference to her theme of engaging with businesses.

Council

Your Council for 2024/25 is shown below. It met six times during the year, on 8 May, 26 Jun, 4 Sep, 6 Nov, 15 Jan and 19 Mar. Attendance and possible attendance, including last year's AGM, is also shown.

President – **Brian Brookes** Dip CII (Clear) 7/7
Deputy President - **Michelle South** Cert CII (Brokerability) 5/7
Secretary and Dinner Secretary – **Mary Rogerson** (Anthony James) 5/7
Treasurer – **Grant Scott** ACII Chartered Insurance Broker (NFP) 2/7
Deputy Treasurer and Vice President - **Sue Hull** ACII, Chartered Insurance Broker (PIB) 4/7
Deputy Treasurer and Sponsorship – **Julie Rayson-Lee** (Adler Fairways) Cert CII 3/7
Education, Membership & Regional – **Keith Torrance** FCII, DMS, MCMI, Chartered Insurance Practitioner 7/7
Communications, Publicity, and Vice President – **Florence Dennis** ACII (Willis) 1/7
PFS Planning and Charities Rep – **Janice Fielding** FPFS, FCII, Chartered Financial Planner (Fairstone) 4/7
Sports & Social, Joint Secretary – **Pardeep Gill** ACII Chartered Insurance Broker (Albany) 7/7
Sports & Social, Joint Secretary – **Tom Mulligan** Dip CII (Albany) 6/7
Equality, Diversity & Inclusion Co-ordinator – **Stephen White** Cert CII (Leicester City Council) 4/7
Next Gen and Careers **Amy Godson** Cert CII (Howden) 5/7
Vice President - **Adrian Mee** B Soc SC (Hons) Dip PFS (WKM Wealth) 0/7
Allison Marshall (Idex) 0/7
Callum Shevas BSC (Hons) ACII Chartered Insurance Broker (Abaco) 0/7

Past President **Adrian Mee** is stepping down from Council. His presidential year coincided with the start of the COVID pandemic so he had an extremely challenging time leading us through uncharted waters. The President has thanked him for his service.

CALENDAR OF EVENTS 2024/25

Date 2024	Subject or Event	Presenter	Medium	For
24 Apr	Annual General Meeting, Marriott Hotel		F2F	ALL
10 May	Dip PFS R02 Exam training. Two days.	BTS	Virtual	PFS
17 May	Dip PFS R03 Exam training. Two days.	BTS	Virtual	PFS
21 May	Five-a-side Football Tournament, Goals Soccer Centre	Sports & Social	F2F	ALL
07 Jun	Dip PFS R05 Exam training	BTS	Virtual	PFS
07 Jun	Dip PFS R04 Exam training. Two days.	BTS	Virtual	PFS
11 Jun	Summer XCHANGE 2024 - Real World Opportunities	King Power	F2F	PFS
18 Jun	Public Speaking for Emerging Leaders	Susan Heaton-Wright	Webinar	ALL
24 Jun	Providing Exceptional Service. Full day seminar.	Sarah Hilton, Premium Credit	F2F	ALL
28 Aug	Advanced Dip PFS AF1 Exam training. Two days.	BTS	Virtual	PFS
01 Sep	ACII, Dip and Cert CII exam training sessions start	Intuition Training	Virtual	GI
03 Sep	Workplace Pensions: Facts and Opportunities	Craig Muir, Royal London	Webinar	PFS
12 Sep	Annual Treasure Hunt on Foot	Sports & Social	F2F	ALL

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13 Sep	Advanced Dip PFS AF4 Exam training. Two days.	BTS	Virtual	PFS
19 Sep	Critical BI learnings for brokers following the Infinity Reliance judgement	Alan Chandler	Webinar	GI
24 Sep	Trusts - The Estate Planner's Secret Weapon	Nick Edwards, Trustee Support	Webinar	PFS
25 Sep	Why DE&I should still be a priority for businesses in 2024	Jill Hambley, Ins Compliance	Webinar	ALL
04 Oct	An Introduction to Trade Credit Insurance	Jane Hull, Tokio Marine Kiln	Webinar	GI
01 Nov	Annual Dinner, Marriott Hotel		F2F	ALL
14 Nov	Bulls Eye Bash. Next Gen Darts Night	Next Gen	F2F	ALL
19 Nov	Bridging Generations: Mastering Cross-Generational Communication. National Space Centre. Seminar.	Adam Owen, NextGen Planners	F2F	PFS
02 Dec	Presenting in Business. Full day seminar	Walter Blackburn, Presenting Success	F2F	ALL
02 Dec	Jingle & Mingle. Next Gen Christmas Quiz Night	Next Gen	F2F	ALL
04 Dec	Tax Planning - A Topical Case Study	Nick Edwards, Trustee Support	Webinar	PFS
11 Dec	Managing Tricky Conversations	Caroline Martin, Enabling Wings	Webinar	ALL
2025				
23 Jan	AI for Financial Planners. National Space Centre. Seminar.	Adam Owen, NextGen Planners	F2F	PFS
01 Apr	Dip and Cert CII exam training sessions start	Intuition Training	Virtual	GI
01 Apr	FCA GI Consumer Duty, Premium Finance & Multi-Occupancy Update	Branko Bjelobaba	Webinar	GI
03 Apr	AI for Non-Techies. Full day seminar. Winstanley House	Nick Crawford, AI for Non-Techies	F2F	ALL

Webinar indicates a session of one-hour or so. Virtual indicates a longer session – half or full day – or a series of sessions.

Below are more photos from the Dinner and some of our other events this year.

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Above. Nick Crawford from AI for Non-Techies with (left) Council members attending the event and (right) the team from Albany who turned out to be winners of the competition for best use of AI.

Below. Competitors in Next Gen's Darts night and the President, definitely the best dressed of either sex, as Quiz Master at Next Gen's Mingle & Jingle quiz.



The transfer of office from outgoing President, Stephen White (right), to Brian Brookes at the 2024 AGM.

Michelle South gets used to her Deputy President's badge of office.



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Links

For those not reading this report digitally, the weblinks are:

<https://www.localinstitutes.cii.co.uk/leicester/home/about-us/contacts/>

<https://theinsurancecharity.org.uk/insurance-charity-awareness-week-2025/>

<https://www.localinstitutes.cii.co.uk/leicester/home/about-us/contacts/>

<https://vimeo.com/877513301>

<https://www.thepfs.org/membership/pfs-local-committees/east-midlands/>

<https://www.cii.co.uk/login>

<https://www.localinstitutes.cii.co.uk/leicester/home/about-us/news>

<https://www.localinstitutes.cii.co.uk/leicester/home/events/202526/annual-general-meeting-2025/>

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