



The Insurance
Institute of
Manchester
Chartered Insurance Institute



**Annual General Meeting
Thursday 24th April 2025**

Annual Report 2024-2025



The Insurance
Institute of
Manchester
Chartered Insurance Institute

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General information

Email: lii.manchester@cii.co.uk
Web: www.cii.co.uk/manchester
Facebook: The Insurance Institute of Manchester
LinkedIn: Insurance Institute of Manchester

Programme

- Welcome and President's Address
- AGM formalities
- Incoming President's goals and objectives for 2025-2026
- Cyber Panel Discussion

1 hour of continuing professional development can be claimed for this event if relevant to your learning and development needs.

152ND Annual General Meeting of the Insurance Institute of Manchester 2025

The notice of the AGM and the copy of the 2024 minutes have been sent to members on email and also available via the website at www.cii.co.uk/manchester.

The existing Council recommends that members vote in favour of all the resolutions being proposed at the AGM, which they consider to be in the best interests of the Institute as a whole. We will vote en masse, however if there are majority of objections, we will vote separately for each point:

- The proposed President of the Institute for 2025/2026 is Marc Hargreaves of Zurich
- The proposed Deputy President of the Institute for 2025/2026 is Emma Ackers of Empower Development
- To receive and adopt the Treasurer's Report and Accounts for 2024
- To receive and adopt the Annual Report of Council for 2024/25
- To elect the following Vice-Presidents for the session 2025/2026
 - Under rule 8) Stacey Sheridan, Sandra McDonald, Paul Heathcote,
 - Under rule 8.4) Eleanor Moore
- To elect the following ex-officio members of the Council for the session 2025/2026
 - Secretary:** Anita Pollistretti, Ecclesiastica Insurance
 - Treasurer:** Lisa Petherick, Volkswagen Financial Services

Committee Chairperson(s) & Representatives:

CPD Chair:	Nicola Cattan, McLarens
Education Secretary:	Emma Ackers, Empower Development
Events Chair:	Chris Lynch, Ignite
MIIndful Manchester Chair:	Scott Winn, Vista
Dinner Secretary:	Lydia White, HSB Engineering Insurance
Diversity Officer:	Andrew Panayiotou, Premierline & Jordan Hurst, C Lewis & Co
Regional Forum Officer:	Paul Heathcote, Marsh
Governance Chair:	Katie Jackson, Griffiths & Armour
Liaison Officer:	Eleanor Moore, NFU Mutual
Communications Officer:	Sandra McDonald, McLarens

To re-elect the following Council members (not in named positions) for the session 2025/2026: Dina Railean, Rebecca Vidler and Ryan Conroy

- To appoint Accountants for the session 2024/2025
- Appoint a Charities Representative: Brad Jackson, Catalyst Claims

Confirmation of date & time of next AGM: TBC

Local Institute Council and Officers 2024-2025

President:	Stacey Sheridan
Deputy President:	Marc Hargreaves
Vice Presidents:	Paul Heathcote Eleanor Moore Fintan Griffin Mike Cranny
Secretary:	Emma Ackers
Treasurer:	Lisa Petherick
Governance Chair:	Katie Jackson
Education Secretary:	Ryan Conroy
CPD Committee Chair:	Nicola Cattan
Key Dinners Committee Chair:	Lydia White
Events Committee Chair:	Christopher Lynch
Mental Health & Wellbeing Chair:	Scott Winn
Regional Forum Officer:	Paul Heathcote
Charities Representative:	Brad Jackson
Liaison Officer:	Eleanor Moore
Constitution Officer:	Mike Cranny
Communications Officer:	Sandra McDonald
Elected Members April 2024:	Danielle Gowrie, Dina Railean, Dan Whitehouse, Paula Parslow, Rebecca Vidler



President's Annual Review 2024-25

Stacey Sheridan, President
Verbal presentation



Secretary's Report

Emma Ackers Cert CII PTLLS MSET

The purpose of our institute is to provide our members with access to a diverse range of CPD events, promote insurance qualifications, and host social gatherings such as dinners for both our members and the wider insurance community. The success of our institute is driven by the tireless efforts of our volunteers, who have worked over the past year to deliver a superb calendar of events and ongoing support for our members. Their dedication is truly commendable, and they are a credit to the institute.



A special mention goes to Ryan Conroy, who has completed his second and final year as Chair of the Education and Development Committee. Under Ryan's leadership, the committee has organised several outstanding initiatives, including the Jubilee Prize Awards, which recognise outstanding achievements in the Manchester region's CII qualifications. The Fast-Track ACII and Diploma Programme, as well as the Leadership and Development Programme. Ryan and the committee have also made significant strides in promoting insurance as a rewarding career path within schools and colleges across the region. We thank Ryan for his unwavering commitment and hard work on behalf of the institute.

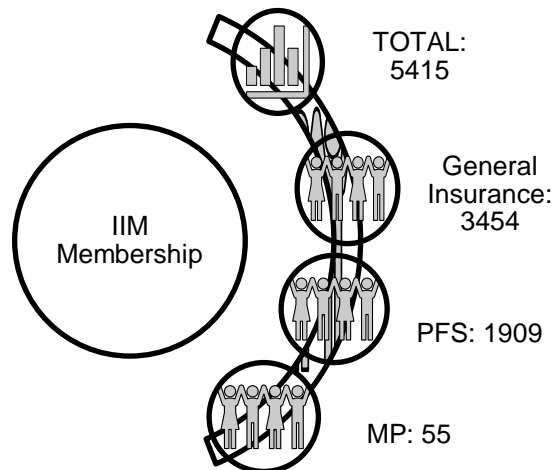
Nicola Cattani has taken on the role of CPD Chair, and together with Judith Simister, has developed a jam-packed CPD calendar. The quality of these events has been exceptional, and the positive feedback from our members speaks to their relevance and impact.

The Events Committee, led by Chris Lynch, has provided valuable networking opportunities through a variety of fun and engaging activities. Their efforts have allowed members to connect across the market and build lasting professional relationships. Meanwhile, the newly renamed Mental Health and Wellbeing Committee, chaired by Jordan Hurst and Scott Winn, has made an invaluable contribution by hosting the Pride Walk and addressing critical issues with timely and impactful events.

The Dinners Committee, chaired by Lydia White, deserves special thanks for providing us with wonderful opportunities to come together, network, and most importantly, enjoy each other's company in a relaxed, social setting.

Lastly, I would like to express my sincere gratitude to Eleanor Moore, Sandra McDonald, Lisa Petherick, Katie Jackson, our 2024-2025 President Stacey Sheridan, and incoming President Marc Hargreaves for their ongoing support and guidance during my first year on Council. Their collective knowledge and patience have been invaluable in my learning process. Here's to an even more successful 2025-26!

Membership figures as of April 2024



Council Members with Special Responsibilities

Regional Forum Officer

The North West Regional Officers meet three times a year to discuss best practice, good news and any issues. They report to their National Forum Officer who will meet with other National Forum Officers three times a year to take any concerns to the CII Board.

Liaison Officer

In conjunction with the President and all other council members, to co-ordinate and actively encourage companies and individuals to become involved with the Institute.

Charities Representative

In conjunction with The Insurance Charities, to co-ordinate matters specifically relating to charities.

Dinner Secretary

In conjunction with the President and Deputy President, to co-ordinate all matters specifically relating to the Institute's Annual Dinner.

Charities Representative's Report

Brad Jackson ACII

The focus in the fifth year as the Manchester Insurance Institute Charities representative has been to continue to raising awareness of The Insurance Charity amongst current and former insurance employees.

The charity does not only provide financial support, but they also provide a lifeline to people with difficulties they may be facing such as:

- Poor health
- Domestic abuse



- Relationship breakdown
- Depression
- Disability
- Financial problems
- Tragedy
- Redundancy

Snapshot of the support provided in 2024 -2025



The Insurance Charity is a charity for the UK and Irish insurance profession, providing support for current and former insurance employees and their dependants since 1902. They give over £1.4million of help each year to insurance people in need.

Earlier this year The Insurance charities changed their name to The Insurance Charity and updated the strapline to **Supporting insurance people when they need us most**. You can hear from the Chairman and CEO about the changes - <https://www.youtube.com/watch?v=bifNeWmNGRE>.

A fresh new website was launched following the revised identity.

The Insurance Charity has also removed the minimum length of time people in the industry need to access their support. Now, anyone who has spent time working in insurance, no matter when and for how long can apply for support.

We must take this time to thank retiring CEO Annali-Joy Thornicroft for her 40 years' service to the Insurance Charity and welcome Helen Sanson as the new CEO.

Manchester is one of the larger regions, and therefore it is important to keep raising awareness across the various businesses based here in the city and surrounding areas, and this is an important part of

the role. To qualify, a recipient needs to have worked for five years in insurance and in need of financial assistance. An applicant does not need to be a CII member to apply for help.

In the Manchester area The Insurance Charity has made awards to 7 beneficiaries totalling £26,398.00. Awards were for a student grant / counselling / travel to hospital appointments / day-to-day hardship & child activities. They distributed 5 Christmas hampers and 2 Summer hampers in the year.

They currently have 19 active beneficiaries in the region.

The [Insurance Charity Awareness Week](#) (ICAW) will run from 23rd to 27th June in 2025. Last year the charity reached more insurance colleagues than the previous year and saw applications for support increase following the campaign.

You can help by sharing the online posts on both LinkedIn and Twitter and can use the #ICAW in the lead up to the awareness week.

The Insurance Charities have free giveaways for companies to distribute to employees. These can be ordered from <https://theinsurancecharity.org.uk/order-your-awareness-week-giveaways/> up to the 14th May 2025

There will also be digital supporter toolkits to assist everyone get involved in the awareness week.

The Insurance Charities have a stand at the BIBA conference on 14th and 15th May 2025.

If you are aware of any person in need of help and support and you think the Insurance charities can help, then please do not hesitate to contact me via the Manchester Institute.

Key Dinners Committee Report

Lydia White

The Dinner's Committee organises the key events of the year: Style in the City, the Annual Dinner and 2024 saw the return of the Young Members Ball.

This was my first year as Chair of the Committee and although it was challenging at times, it was a huge privilege to be a part of. It was an honour to be organising my fellow HSB colleague, Stacey Sheridan's Dinner, and what a Dinner it was. We had an astonishing amount of money raised at the Dinner for Stacey's chosen charity, Reuben's Retreat, of £37,000.



The Young Members Ball was the first event I organised as Chair. This is the first time this event had been held since 2019. The Young Members Ball is a fantastic networking event for our emerging insurance professionals. The Ball will be back at the Marriott Victoria & Albert Hotel on Thursday 1st May 2025.

We have a circus themed Style in City returning to the Midland on Friday 20th June 2025. Our Masquerade Annual Dinner will be held at the Kimpton on Friday 14th November 2025. Both venues we have signed another 3 Year contract with and secured dates for 2026 and 2027.

I would like to express my appreciation to all of our sponsors and the wider insurance industry for their ongoing support of our events each year. These key networking events would not be possible without their generosity and commitment.

A special and personal thank you to Stacey Sheridan, Hannah Muldowney, Katie Jackson, Sandra McDonald and Lisa Petherick. The success of last year's events was largely due to their unwavering support and dedication to the institute, as well as the collaboration with our AV supplier, Sterling, and the fantastic Operations Team's at all our venues. Our suppliers ensure our events run seamlessly and it is an honour to work alongside them.

We have a brilliant Committee going into 2025. The Key Dinners Committee Members are: Lydia White (Dinner Secretary), Hannah Muldowney, Stacey Sheridan, Rebecca Webster, Jimmy Reynolds, Paul Heathcote, Harry Wallbank, Hayley Walker, Aeneas Robinson & Laura O'Connor.

We will always welcome any new members, so please feel free to reach out to me if you're interested in getting involved.

Institute committees:

Finance & Governance

Includes senior council members and an independent individual. The committee meets on a regular basis to oversee the grant, spending patterns, budgets and consider future financial expenditure.

Education & Development

To advise on examinations locally, promote insurance and financial services as a career choice and promote CII qualifications. The committee also organises the annual Jubilee Prize Awards which take place each year in to reward local excellent in CII examinations.

Continuing Professional Development (CPD)

To provide learning opportunities to help members increase and maintain their knowledge as part of the CII CPD requirements. Hosts seminars and webinars to benefit members. Committee members source speakers to attract a diverse member base in areas such as claims, underwriting, broking and financial planning.

Events

To arrange sporting, social and networking events for the institute members. It is too easy nowadays to think that the demands of work leave us no time for other activities. Our purpose is to allow the opportunities for members to meet other members in a less stressful environment

MIndful

To encourage wellbeing and mental health to be openly talked about, and to be a reference point for support and guidance to institute members, if needed. Most committee members are also Mental Health First Aiders who can signpost to support services,

Treasurer's Report

Lisa Petherick ACII

The Insurance Institute of Manchester (IIM) has had an incredibly productive year, offering a wide range of CPD and social events. These activities continue to support our members' professional growth and foster a sense of community. While achieving strong attendance at some events remains a challenge, the dedication of the entire council and committees has helped us build on past successes and develop new opportunities.



The Treasurers role sits on the Finance & Governance committee, which ensures the finance function receives sufficient oversight and management. The committee's wider role is to ensure that the IIM conducts itself in an appropriate way to deliver its objectives to members; the committee meets a few times per year to ensure this is the case.

It's always important to provide clarity on how the IIM is funded, as this context helps make our financial statements more meaningful. The institute's income is derived from two primary sources:

- Annual grant from the CII and
- Revenue from ticket sales for popular events such as the Annual Dinner or Style in the City.

The receipt of the annual grant from the CII comes with specific commitments and can only be used to fund CPD, Learning, and Education programmes for our members.

All social events are required to be self-funded, ensuring they either break even or generate profits. Any social event profits are subsequently donated to the President's chosen charity.

The annual grant is paid in two instalments, one in January and the other in August. The amount paid is based on local membership numbers as well as the results of an annual assessment conducted by the CII. This assessment evaluates how the institute is managed, covering areas such as governance, the composition and rotation of the council and the variety of events offered.

With the continued adoption of virtual formats, our expenditure on CPD and Learning & Education has remained well within grant funding limits. As a result, the IIM remains in a strong and robust financial position.

Finally, I would like to extend my gratitude to all our council members. Your support and understanding when submitting payment requests are invaluable and appreciated, ensuring a smooth and efficient financial process.

Profit and Loss

The Insurance Institute of Manchester For the year ended 31 December 2024

	2024
Turnover	
General Grant	76,842.68
Other Revenue	359.47
Social & Charitable Event Income	103,198.00
Total Turnover	180,400.15
Cost of Sales	
Agency Staff	5,315.63
CPD Event Expenses	12,340.02
Education Expenses	24,423.87
Social & Charity Event Expenses	109,973.54
Total Cost of Sales	152,053.06
Gross Profit	28,347.09
Administrative Costs	
Accountancy fees	2,709.00
Bank Fees	406.30
Hotel Expenses	3,475.74
Insurance	1,181.67
IT & Software	1,144.64
Printing and Design	235.70
Professional Fees	1,593.70
Travel - National	40.95
Total Administrative Costs	10,787.70
Operating Profit	17,559.39
Profit on Ordinary Activities Before Taxation	17,559.39
Profit after Taxation	17,559.39

Profit and Loss

The Insurance Institute of Manchester For the year ended 31 December 2024

	CPD	EDUCATION	EVENTS	MIINDFUL MCR	OFFICE	PRESIDENT	UNASSIGNED
Turnover							
General Grant	-	-	-	-	76,842.68	-	-
Other Revenue	-	-	-	-	-	-	359.47
Social & Charitable Event Income	-	3,250.00	99,948.00	-	-	-	-
Total Turnover	-	3,250.00	99,948.00	-	76,842.68	-	359.47
Cost of Sales							
Agency Staff	-	-	-	-	5,315.63	-	-
CPD Event Expenses	3,752.22	4,919.10	1,593.70	2,075.00	-	-	-
Education Expenses	-	24,423.87	-	-	-	-	-
Social & Charity Event Expenses	-	-	109,073.54	-	900.00	-	-
Total Cost of Sales	3,752.22	29,342.97	110,667.24	2,075.00	6,215.63	-	-
Gross Profit	(3,752.22)	(26,092.97)	(10,719.24)	(2,075.00)	70,627.05	-	359.47
Administrative Costs							
Accountancy fees	-	-	-	-	2,709.00	-	-
Bank Fees	-	-	-	-	-	-	406.30
Hotel Expenses	-	-	-	-	-	3,475.74	-
Insurance	-	-	-	-	1,181.67	-	-
IT & Software	-	-	-	-	1,144.64	-	-
Printing and Design	-	-	235.70	-	-	-	-
Professional Fees	-	-	-	-	1,593.70	-	-
Travel - National	-	-	-	-	-	40.95	-
Total Administrative Costs	-	-	235.70	-	6,629.01	3,516.69	406.30
Operating Profit	(3,752.22)	(26,092.97)	(10,954.94)	(2,075.00)	63,998.04	(3,516.69)	(46.83)
Profit on Ordinary Activities Before Taxation	(3,752.22)	(26,092.97)	(10,954.94)	(2,075.00)	63,998.04	(3,516.69)	(46.83)
Profit after Taxation	(3,752.22)	(26,092.97)	(10,954.94)	(2,075.00)	63,998.04	(3,516.69)	(46.83)

Balance Sheet

The Insurance Institute of Manchester As at 31 December 2024

31 DEC 2024

Current Assets

Cash at bank and in hand	
IIM (Debit Card)	2,415.91
Main Institute Account	107,278.52
The Insurance Institute of Man	1,330.00
Total Cash at bank and in hand	111,024.43
Total Current Assets	111,024.43

Creditors: amounts falling due within one year

Accruals	1,968.00
Total Creditors: amounts falling due within one year	1,968.00

Net Current Assets (Liabilities) 109,056.43

Total Assets less Current Liabilities 109,056.43

Net Assets 109,056.43

Capital and Reserves

Current Year Earnings	17,559.39
Reserves	30,238.20
Retained Earnings	61,258.84
Total Capital and Reserves	109,056.43

Education & Development Committee Report

Ryan Conroy, Education Chair

The Education and Development committee consists of 11 committee members. Emma Ackers deputises the committee. I would like to thank all of the committee members for their support this year in achieving our goals in another challenging year.

Jubilee Prize Awards 2024

The Annual Jubilee Prize award event was one of the highlights of the year for the committee.

This was a stand-alone event held at the Everyman Cinema

The award ceremony is to celebrate the outstanding success of the prize winners who gained the highest scores in the CII examinations. Congratulations once again to the winners of 2024 and thank you again to the sponsors listed below.

Award	Winner	Sponsor
Best Cert CII performance	Dr Ronnie Tan	Howden
Insurance Law	Mrs Angela Meats	ITP
Insurance Broking Practice	Miss Anisah Khan	Bridge Insurance Brokers
Claims Practice	Miss Catherine Rendall	Sedgwick
Insurance Business and Finance	Mr Toby Cowling	Empower Developments

Liability Insurances	Ms Anita Pollastretti	Clegg Gifford
Underwriting Practice	Mr Carl Mountney	Arch
Commercial Property and Business Interruption	Mr Charles Craig	BIBA
Risk Management	Miss Lydia Donnelly	Jenzah Consulting
Best Dip CII performance	Miss Lucy Stansfield	Griffiths & Armour Insurance Brokers
Advanced Claims	Miss Sophia Palfreyman	Carolyn Bowers
Best ACII completion	Mr Ian Robinson	McLarens
Youngest ACII completion	Mr Kieran Whaley	Aviva

Insurance Careers

One of the Education and Development Committees commitments was to increasing engagement with local schools and colleges to promote careers in the Insurance industry. Over the past year, members of the committee have attended careers events at a number of schools and colleges in the Greater Manchester area:

As 2025 progress, the committee continues to promote the Manchester insurance market and insurance in general through assisting with careers fairs. We will also be looking to make further contact with local schools and colleges over the next year and will be looking for new opportunities to promote the insurance industry as a career for school leavers.

Fast Track ACII & DIP

Our Fast Track ACII program has now completed, I would like to congratulate the candidates for successfully obtaining their ACII within the fast-track timeframe. We will look to relaunch this programme in mid-2025.

Our Diploma fast track is on course to finish Q2 of 2025 with a 100% pass rate. I Wish all candidates the best of luck in their final exam and congratulate them on their success that they have had so far.

We have just re launched this programme again with a new intake of 12 candidates this will run until 2027. I wish them the best of luck in their studies.

The Leadership Programme 2024

With the success of previous programmes, it was decided at the end of last year that we would put on a similar programme for 2024, titled the Leadership Programme. This would have a focus on developing the member's career and giving the attendees the tools needed which they may not necessarily be able to obtain, during their normal day to day job.

Due to the pandemic, previous courses have run virtually however we decided to hold this course on a face-to-face basis. This was run by Alison Clegg from Highridge HR.

The course was a success, receiving positive feedback form all involved. It is our understanding that some of the candidates have received internal promotions following the completion of the course.

Committee Members:

Ryan Conroy (Chair), Emma Ackers (Deputy Chair), Sam Baxter, Hokey Chik, Mark Farrant, Libby Empson, Anita Pollastretti, Korey Amusa, Emanul Islam, Elisha Snape Rebecca Vidler.

CPD Committee Report

Nicola Cattan



In the last year, we have offered a programme of technical topics, soft skills, and revision support.

IIM Bitesize was a new initiative last year, which was introduced to dissect the various areas of the industries and to provide an overview and insight in basic terms. This is aimed at those new to insurance and financial services and those who wish to diversify their knowledge. We have really driven the initiative this year and it has been well received.

We have delivered 32 hours of CPD in the last year and are looking to increase this going forward by offering pre-recorded online sessions. We are also looking to reintroduce to face to face interactive/networking sessions across the year.

We have had a variety of speakers from across the industry, and I would like to take this opportunity to thank them all. I would also like to thank the committee members who volunteer their time to build and deliver the CPD programme particularly Judith Simister who leads the soft skills and revision support elements and Nia Roberts supporting on communication. Our committee has grown this year and are delighted to welcome back to the committee Paul Hudson and Daniela McGowan.

If anybody has any ideas for topics, please feel free to get in touch with any committee member.

Committee members:

Nicola Cattan (Chair), Emma Ackers, Gillian Dean, Liam Greene, Marc Hargreaves, Paul Hudson, Paula Parslow, Janet Penny, Charlotte Renshaw, Judith Simister, David Swali and Daniela McGowan.

Events Committee Report

Christopher Lynch



2024 was a reasonably strong year for the Events Committee, with a decent calendar of events delivered.

March saw us kick the year off by stepping up to the oche for our 'Let's play darts' night, which was a great success. It was encouraging to see so many younger members engaging with our events.

In April we held the ubiquitous football tournament, which seems to get bigger and bigger each year. It was great to see so many old faces and new teams alike. And I believe that 2025's tournament is even bigger!

In the summer we held a joint BBQ with BIBA on the roof terrace of Clyde & Co, who were hugely supportive. We're currently planning this year's event and looking to improve on the 60 attendees in 2024.

October saw us swirling and sniffing wine and cheese at a great night with Manchester Wine School. What's not to like? And then towards the end of October we held the joint quiz with BIBA, which is a fantastic event and always well received.

We're in a good place to put on a full and engaging schedule for 2025/6 and have started the year strongly. The key is linking up with other associations across Manchester, like iCAN and BIBA to ensure good promotion of events and share resources. One important goal for the committee is to add one or two members to add a little energy and some creativity.

Committee Members

Chris Lynch (Chair), Rachel Birkett (Deputy), Richard Townsend, Natalie Albert.

Mental Health & Wellbeing Committee Report

Scott Winn (Chair) & Jordan Hurst (Deputy)



It has been 5 years since MIndful Manchester was launched, with a focus on improving the mental wellbeing of our members, as well as awareness of the subject.

The objective of the committee is to encourage wellbeing and mental health to be openly talked about, and to be a reference point for support and guidance to institute members, if needed.

Six members of the committee are trained in Mental Health First Aid (these are listed on the IIM website), and can signpost members to organisations for support, if required. However, they can just be a port of call for someone to talk to if or when the time comes. Most importantly, our committee is here to offer a confidential, non-judgemental space.

The committee this year has undergone a re-brand and a re-focus, renaming itself to the Mental Health & Wellbeing Committee from MIndful Manchester. Since COVID, the committee has mainly produced online learning webinars in topics such as improving sleep, mental health support, and improving our overall well-being. The new focus on the committee is to have more in person events. This started with our in-person event on Digital Wellbeing & Positive Parenting in a Digital World. The feedback from this event was excellent. The event started a partnership with Clyde & Co for hosting events in their offices, which will aid the committee going forward.

A list of webinars ran by the committee this year is included below:

- Mindfulness Programme 2024: The Extraordinary Power of Self-Compassion
- Mindfulness Programme 2024: Sleep
- Mindfulness Programme 2024: The Exhaustion Funnel
- Mindfulness Programme 2024: Thoughts are not Facts
- Mindfulness Programme 2024: Making Home in the Present Moment
- Mindfulness Programme 2024: Use Your Imagination
- Mindfulness Programme 2024: Rest Into Gravity
- Mindfulness Programme 2024: The 4 Bs of Breath

Plans for next year include a mental health walk, an in-person event on parenting and a leadership session for mid-level managers.

As always, we actively welcome new members on an ongoing basis, and have recruited some new members throughout the last year. If you want to get involved in the network, please send an e-mail to the Committee Chair, Scott Winn (Scott@VistaInsurance.co.uk) who will be happy to speak to you.

Committee Members: Scott Winn (Chair), Jordan Hurst (Deputy Chair), Rhi Caddy, Aenaes Robinson, Lily Walker, Andrew Panayiotou, Jordan Haskayne, Catherine Hulme, Jayne Drummond, Jake Rochell, Eilis Sweeney.

Diversity Equity & Inclusion Committee Report

Andrew Panayiotou ACII (Chair) & Jordan Hurst (Deputy)

2024-2025 has been an important year for DE&I, not just for the Insurance Institute of Manchester (IIM) but across all communities and sectors.



Therefore, whilst there are a number of key responsibilities for the Diversity Officer role within an Institute, I think the opening paragraph of the overview provided by the CII for the role sums it up nicely:

“The role of the diversity officer must raise awareness of equality, diversity and inclusion whilst ensuring that the local institute complies with appropriate equality and diversity legislation and

requirements. The diversity officer must also act as a facilitator in order to pass information between the CII and the local institute council.”

It has been key for Jordan and I to ensure that all committees consider DE&I when looking at putting on events and/or running programmes, so that all members feel like they can be included and have the opportunity to participate and thrive, such as, ensuring the venue of the Annual Presidents Dinner was accessible to wheel chair users, those with a mobility impairment or walking difficulty, due to the event taking place below ground floor.

We have tried to achieve this through participation in meetings across all committees, which has been well received by all. I have no concerns that any committee is not taking DE&I into consideration during their discussions or when planning an event.

Other highlights for the year

Forged closer alignment to other networks that members may be connected to, in support of the President of the IIM, to ensure that members feel closer connected to the IIM, these are:

- a. Link Up North - An LGBTQ+ Network that services the Insurance Industry outside of London.
- b. iCAN – The Insurance Cultural Awareness Network
- c. BIBA – The British Insurance Brokers Association

Following the IIM participation at the Manchester Pride event for the second time in August 2024, which would not have been possible without the perseverance of Jordan and Stacey, thank you, it has now been passed over to the Events committee to manage moving forwards. This will help to ensure it is a considered annual event going forwards for the IIM and Link Up North have offered their support in running/planning this event too in future.

I would like to thank all Committee Chairs and Members for embracing the discussions we've had throughout the year to help make the IIM as inclusive as possible for our members, and long may this continue.

We can always improve on DE&I and would welcome any feedback from members on ways in which the IIM can improve on this across the board.

Communications Committee Report

Sandra McDonald BA (hons) Cert CII ACIM Cert CILA

The Communications Committee was officially included in the last AGM for the first time, with the aim of streamlining processes and ensuring people with the required training and skillset were tasked with promoting our initiatives.



The committee was started with those who were already undertaking these tasks for the other committees and provided training on using the website and email systems. We aim to meet every 6 weeks to review completed work and what we could do better.

The work involves a range of responsibly, sometimes writing the content for events of social posts, usually editing content, and almost always using online systems to spread our messages.

Two notable items from this year, outside of usual advertising work, include:

- Creating the manchesterinsurancecii@gmail.com email to allow better access to communicate with members, this includes emails sent to iii.manchester@cii.co.uk
- Creating a new LinkedIn group 'Insurance Institute of Manchester' to allow better admin access. We are in the process of moving away from the person set up as 'The Insurance Institute of Manchester'.

Whilst we aim to align a Communications Committee member with each of the other committees, work commitments mean we need to remain flexible. I would like to thank Sam and Nia for their flexibility

and great responses. I thank the whole committee for their work, including Daniel Whitehouse, Sedgwick, who has recently stepped down from the committee.

Committee Members:

Sandra McDonald, McLarens (Chair), Nia Roberts, Woodgate and Clark, Sam Drysdale, MFL insurance, Ben Carey, HSB Engineering Insurance, Jordan Hurst, C. Lewis, Helen Hall, Lift Insurance

Council Proposed President 2025-26

Marc Hargreaves



As we enter our 152nd year in 2025/26, I am honoured to serve as your President. I'm Marc Hargreaves, and my journey in the insurance industry began in 2007 with the Allianz Graduate Scheme in Manchester. Since then, I've had the pleasure of working with LV, Ageas, and Zurich. My passion for insurance was ignited during an internship at Allianz in Munich while pursuing my German degree. Witnessing firsthand how our work helps people and businesses recover from potentially devastating losses truly inspired me.

This year, I have several key goals and initiatives that I am excited to share with you. First, we will be launching an on-demand CPD section on our website, providing flexible learning opportunities for all our members. We will also continue with our successful IIM Bitesize series, offering introductions to various lines of business. Additionally, we have some standout soft skills CPD sessions already booked in, so be sure to check the website for save the dates.

Over the past 14 years, I've volunteered on most committees within the IIM, but my heart lies with CPD. Bringing in quality speakers to discuss relevant topics and enhance the knowledge and skills of our insurance professionals in Manchester has been incredibly rewarding. This experience will help me ensure we continue to offer top-notch resources and support to our members.

I am also pleased to announce that we are looking at relaunching our Emerging Professionals offering, led by my new Deputy President, Emma Ackers. Emma will be consulting on how we can better involve newcomers to the profession and improve our relevance to younger demographics. This initiative aims to support and develop the next generation of insurance professionals in our community.

Supporting my chosen charity, Henshaws, is another key focus for this year. Henshaws is a cause close to my heart as they support individuals with sight loss, and I have a severe visual impairment myself. We will be organizing various fundraising events and activities, including some socials that will involve Henshaws, to raise awareness and support for their incredible work.

We have an exciting year ahead with a full programme of social and networking events. This includes our football tournament, darts, and the IIM BIBA BBQ—all of which will be in person. We are also looking at introducing a pre-BIBA Padel tournament, which should be a fun and engaging way to connect with your peers.

I warmly invite all of you to join us at least one event this year. It's a great opportunity to connect with your peers and make the most of what our vibrant community has to offer.

A big thank you to all our sponsors for their ongoing support of our events and activities. Your generosity is what makes all of this possible.

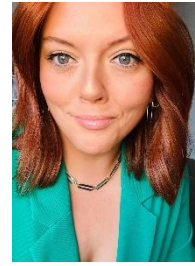
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Here's to an incredible year ahead!

Council Proposed Deputy President 2025-26

Emma Ackers

I am truly delighted to have been nominated as Deputy President for 2025-2026, and I look forward to supporting Marc Hargreaves in his role as President. It is an honour to serve our members across the region, and I am eager to contribute to the continued success of our institute.



Over the coming year, I will be working closely with Marc to support his initiatives, ensuring Manchester's position as a key player in the insurance and financial services market. Additionally, I am committed to assisting Marc with his chosen charity and helping to make a positive impact in our community.

I am also excited about the opportunity to engage with our emerging professionals in the region, promoting the institute and fostering their development. Together, we will work to ensure that our institute remains strong, sustainable, and relevant for future generations.

I wish Marc the very best of luck during his presidential year and offer him my full support as we work together to achieve our goals.

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Thank you to our sponsors for 2025/2026

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