



# Report

**Subject:** PFS Report for AGM 2022

**Ref:**

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**Council Position** Chair, Norfolk PFS committee

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The following is a summary of the PFS (Norfolk) activities throughout 2021.

- **Committee changes:** We had a complete committee refresh, other than Hazel Bowen, with the previous Chartered Champion, Professional Qualifications Officer and Education Outreach Ambassador stepping down in H1 and a new committee forming in H2. Hazel stepped down from the role of Chair at the start of the year and remained on as Education Outreach Ambassador (a role she was already doing in a dual capacity). The new committee members have settled into roles of Chair (Bob Walne), New Professionals Officer (Adam Claydon) and Chartered Champion (Carl Rich).
- **Sponsored diploma initiative:** we opened up this opportunity for a second year and now have two candidates enrolled as student members of the CII and studying towards their Diploma in Regulated Financial Planning. By the end of 2021 our first candidate (Callum Moroney) had successfully passed R01 and unfortunately failed his first attempt at R02 (he has since passed R02 this year). Our second candidate (Mya Dholiwar) was enrolled in September 2021 and is planning her first exam in May
- **PFS events:** part way through the year, in response to a lack of take up of locally organised PFS webinars, we took the decision not to deliver any further online PFS events. Centrally the PFS was delivering frequent events covering soft and technical skills and this left us little else to cover. With the work that goes into organising these as a committee and for the speakers, we felt it was better to pause such events. We delivered a *Digital Detox* session earlier in the year. Towards the end of 2021 we delivered an in-person event *Opportunities for Exceptional Client Conversations* which was well-received by the attendees but had low take up owing to the timing of the event and the Omicron covid variant.
- **Educational outreach:** Hazel was active in this area throughout 2021 and delivered 20 financial education sessions virtually, mainly focussed on our region but also covering sessions nationally. In addition, she attended a careers event at the UEA, which was also attended by Alycia. Hazel was the joint-winner of the PFS Education Outreach Ambassador of the Year award.
- **Looking ahead at 2022:** the committee is focussed on delivering in-person events locally, financial education and committee succession planning. A further diploma sponsorship is under discussion but not confirmed for 2022