



Personal
Finance
Society

Standards. Professionalism. Trust

Personal Finance Society (PFS) Board Member Director



PFS Board Member Director

The Personal Finance Society (PFS) is delighted to announce that is recruiting Full Members to serve as Directors on the PFS Board. This is an exciting opportunity to work alongside high-calibre individuals shaping the future of the PFS, creating a positive environment for members and their clients and influencing the future of the industry.

We are seeking applications from qualified individuals across a diverse range of backgrounds and experiences to ensure the board is representative of the broad skillset amongst our member base. Appointments are open to all PFS members who are DipPFS and above.

We value the benefits of diverse perspectives and experiences. We therefore welcome applications from talented individuals of all backgrounds, irrespective of religion or belief, gender, age, gender identity, disability, sexual orientation, ethnic origin, political belief, relationship status, or caring responsibilities.

Applications from groups that are currently underrepresented in the profession are particularly encouraged, for example, ethnic minorities, members of the LGBTQ+ community, and those identifying with both seen and unseen disabilities.

We would also particularly welcome applications from Members with skills and experience in paraplanning, policy development, compliance or adviser support services, alongside practising advisers, educators, and business leaders across the financial planning profession.

Type of Appointment:

- Director of the PFS Board
- DipPFS or above member appointment
- All reasonable expenses reimbursed

Reporting to:

- The Chair of the PFS Board

Time commitment

The expected time commitment is approximately 12-15 days per year, including preparation; attendance at Board meetings (typically 4–6 meetings); Committee meetings and participation in strategy days, training, the AGM and Member events as required. Although flexibility around availability is appreciated, further detail will be discussed at interview.

Overview

The PFS Board is responsible for the effective governance and strategic direction of the Society. Together, Board Directors ensure the PFS fulfils its mission, acts in the best interests of its Members, and upholds the highest standards of professionalism and public trust.

Each Member Director plays a key role in shaping strategy, influencing decision-making, and representing the views and interests of the wider PFS Membership.

The work of the Personal Finance Society Board and its Members is guided by a shared vision and mission that underpin all aspects of the Society's strategy and governance.

Vision

That PFS Members are universally regarded as the pinnacle of the financial planning profession, setting the benchmark for excellence and inspiring public trust.

Mission

To support our Members and the wider profession in realising the financial ambitions of individuals around the world by:

- Being an influential voice for our Members and every stakeholder.
- Championing the value of the financial planning profession across society.
- Setting and promoting professional and ethical standards.
- Educating and supporting our Members throughout their careers; and
- Providing practical tools and resources to help Members build resilient and successful practices.

Contextual Information

The Personal Finance Society (PFS) is the UK's largest professional body for personal finance professionals, with around 37,000 Members. It forms part of the Chartered Insurance Institute (CII) Group the world's largest professional body for insurance and financial planning professionals, with over 120,000 Members worldwide.

The overarching purpose of the CII Group is:

“To educate and support our Members to deliver services to the highest professional standards and to advocate for the public good.”

By doing so, the Group builds and maintains public trust in the professions of insurance, financial planning, and mortgage advice.

The PFS promotes the value of financial advice, supports education and professional development, and provides thought leadership and insight to advance best practice. Its Members represent the highest standards of technical expertise, ethics, and professionalism.

Role of a Member Director

As a Member Director, you will bring the voice of PFS Members to Board discussions and decision-making. You will help shape the Society’s strategic direction and champion professional standards.

You will:

- Contribute to the development of strategy, ensuring it reflects the needs and interests of Members.
- Uphold the highest standards of governance, ethics, and regulatory compliance.
- Provide insight into emerging trends, opportunities, and challenges facing the profession.
- Act as an ambassador for the Society and its values and support the Society’s mission to maintain public trust and advance professional excellence.

Main Relationships

- PFS Board
- CII CEO & Executive Leads
- CII Corporate Governance Team
- Members
- External partners/stakeholder

JOB DESCRIPTION

Purpose of the role:

Personal Finance Society Board Directors are individually and collectively responsible for the effective governance of the Society, setting strategy, and overseeing its financial and strategic performance.

Main Accountabilities:

1. Promote the success of the Society for the benefit of its Members, ensuring compliance with all relevant laws and regulations.
2. Set and oversee the Society's vision and strategy in line with its objectives.
3. Monitor progress against the approved business plan.
4. Ensure robust governance, risk management, and internal control frameworks are in place and effectively managed.
5. Approve significant financial and non-financial decisions, including the Annual Report and Budget.
6. Prepare for and actively participate in Board meetings, strategy sessions, and key PFS events.
7. Uphold and represent the values, standards, and culture of the Society at all times.

PERSON SPECIFICATION - How will your application be assessed? (S – shortlisting, I – interview)

Essential Criteria

1. Full PFS Member with at least DipPFS qualification or otherwise qualified under PFS bye-laws. (S&I)
2. Demonstrates wide or specialist knowledge and experience of the financial services profession. (S&I)
3. Understands the PFS, its purpose, and demonstrates commitment to its success. (S&I)
4. Demonstrates commercial awareness and strategic thinking. (S&I)
5. Understands the role of a Board and Directors' legal and fiduciary duties. (S&I)
6. Demonstrates understanding of relevant regulatory frameworks (e.g. FCA). (S&I)
7. Exercises sound independent judgement, care, and diligence. (I)
8. Works collaboratively and collegiately, offering constructive challenge where appropriate. (I)
9. Demonstrates excellent communication and influencing skills. (I)
10. Demonstrates professionalism and integrity in conduct and decision-making. (I)
11. Shows awareness of the strategic issues and opportunities affecting the PFS and the wider profession. (I)

Desirable Criteria

12. Understanding of qualifications frameworks and their role in supporting professional development and business advantage.(I)
13. Prior experience as a company director or familiarity with corporate governance frameworks. (I)
14. Experience in implementing or managing compliance and professional standards within a firm. (I)

Term of Office

Member Directors appointed by the Board have an initial term of office up to the conclusion of the next PFS Annual General Meeting (AGM) - scheduled for September 2026 (date tbc) when their re-appointments will be put to the Members in line with the requirements of the Articles of Association (Articles 9.4). After this point, they are required to retire by rotation at an AGM with up to a maximum term of office of six years from the date of appointment.

How to apply: We value the benefits of diverse perspectives and experiences. We therefore welcome applications from talented individuals of all backgrounds, irrespective of religion or belief, gender, age, gender identity, disability, sexual orientation, ethnic origin, political belief, relationship status, or caring responsibilities.

Please email your CV and a covering letter to governanceroles@cii.co.uk including:

- Your PFS Membership number (PIN)
- A statement outlining your motivation for applying (approx. 300 words)
- A statement summarising your skills and experience relevant to this role (approx. 300 words)
- Disclosure of any interests that may present a potential conflict, including other directorships

Key Dates

- **Closing date for applications: 12 noon (GMT), Thursday 14 January 2026**
- **Interviews:** Shortlisted candidates will be invited to interview with a panel of PFS Board Members via Microsoft Teams 3 February 2026.

Equality and Data Protection

On applying for the role, we would also like to invite you to complete our equality monitoring survey. This survey is anonymous, used for monitoring purposes only, and will have no impact on your application for this role. It does however serve a vitally important role in capturing the diversity within the application pool, allowing us to continuously improve our recruitment processes and promote Board diversity.

All applicant information will be treated as strictly confidential and handled in accordance with the Data Protection Act 2018 and UK GDPR.

Further information:

If you have any questions or would like to speak to someone regarding the role before applying, please email CorporateGovernance@thepfs.org

