



Personal Finance Society  
Standards. Professionalism. Trust.

The Personal Finance Society

# Putting public trust at the heart of all that we do

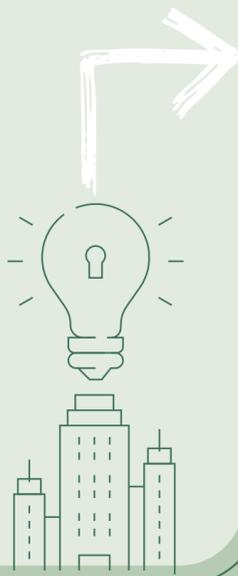
We are the professional body for the financial planning profession in the UK. Our members are respected and recognised for their knowledge and expertise. Together we drive confidence in the power of professional standards.

## Where it all began

The Personal Finance Society is born in January 2005 – a merger of SOFA (Society of Financial Advisers) and LIA (Life Insurance Association).

Our ethos focused on educating and training members, developing the standards which underpin the financial planning profession today and establishing public confidence and trust in the profession.

+ MORE



## Elevated professional standing

Our Code of Ethics underpins our core belief in delivering **Standards. Professionalism. Trust.**

Eligible members receive a Statement of Professional Standing and dual recognition across Europe via EFPA.

Many practitioners strive to achieve Chartered Financial Planner status, which is trusted by consumers and delivers parity with other established professions such as accountancy and law.

+ MORE



## The professional community where financial advisers learn

Members can network with like-minded professionals across our 26 PFS Regions, choosing from **200+** physical or digital events per year.

**PFS Power** – bespoke guidance and good practice for financial planners by financial planners.

**Our Festival of Financial Planning** has changed perceptions across the industry.

+ MORE



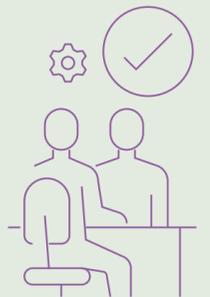
## Consumer Initiatives

We build consumer trust and confidence. Our members benefit by learning new skills, 'giving back' to their communities and helping others improve their financial understanding.

**OVER 200**

businesses hold **Associate Firm status** – a new way for financial advice firms to demonstrate their shared commitment to elevating the value of financial advice and building consumer trust by adhering to **eight core principles.**

+ MORE

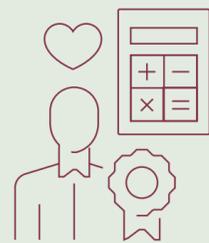


## Building relationships with 'movers and shakers'

Our goal is to share **good practice** and influence outcomes which improve ethical and moral outcomes for consumers.

When the Financial Conduct Authority attends our events, it engages in a constructive way with those it regulates, while our members hear first-hand **'what good looks like'**.

+ MORE

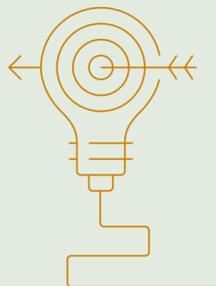


## The power to shape regulatory change

Our influence and reach is respected by regulators; **it helps set standards for competence and influences the profession's future direction.**

We have put forward **innovative solutions** for market-wide challenges such as Professional Indemnity Insurance and offered practical recommendations to reduce the burden on financial advisers during the Covid-19 pandemic.

+ MORE



More to explore

There is much more to explore! Take a closer look at how we are driving confidence in the power of professional standards and shaping the future of the financial advice profession.

Visit [thepfs.org](http://thepfs.org) or follow us on [LinkedIn](#) and [Twitter](#)

