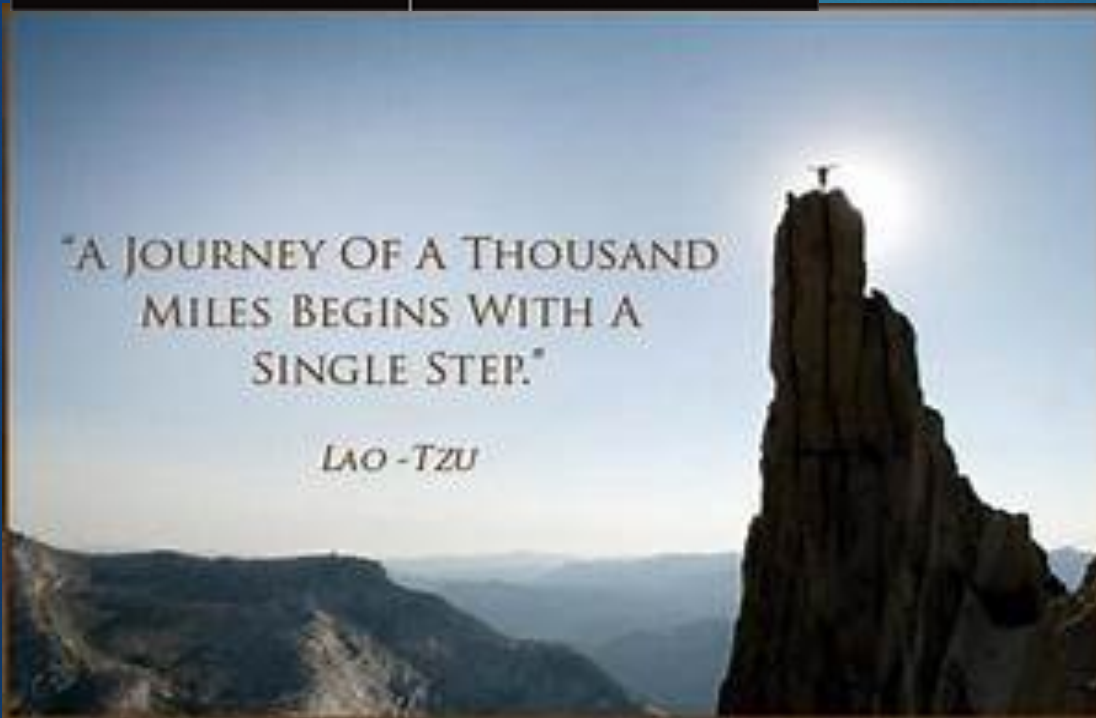


SFPI

Society of Financial
Planners Ireland



SUPPORTING YOU PROFESSIONALLY

Mission Statement



“To enhance the understanding of Financial Planning as a profession and to represent the views of our members with Regulatory, Governmental, Statutory and Consumer bodies.”





Each Financial Planning Professional is different:

Institutionally based
Brokerage
Wealth Management Firms
Practice

SFPI is evolving to meet the profession's needs.

Survey results

Key findings

2016 vs 2019 – key findings

- ▶ Delivering on your expectations – 80% satisfaction rate
- ▶ SFPI events – quality & relevant content
- ▶ Membership growth – increase by over 100% in 3 years
- ▶ Areas for improvement – SFPI website and general communications

What the SFPI offers you

Q3 What motivated you to become a CFP?

skill service financial planning improve clients expertise
professional development provide knowledge qualification

Your focus

- ▶ Promoting financial planning as a profession
- ▶ Professional development
- ▶ Knowledge development and upskilling

- ▶ CPD
- ▶ Networking
- ▶ Advocacy

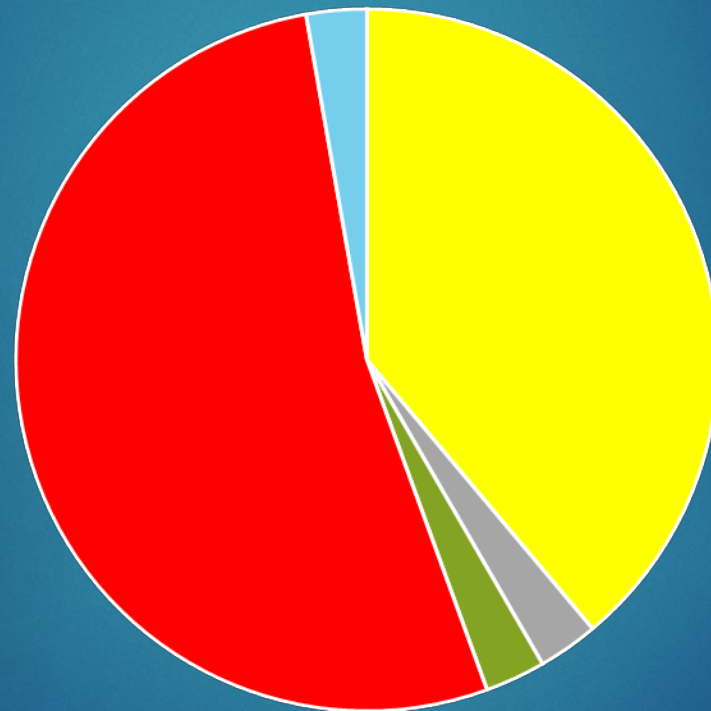


How many years have you worked as a Financial Planner?



■ 0 - 4 years ■ 5 - 10 years ■ 11 - 20 years ■ 21+ years

Which of the following reasons best describes your main motivation for joining the SFPI?



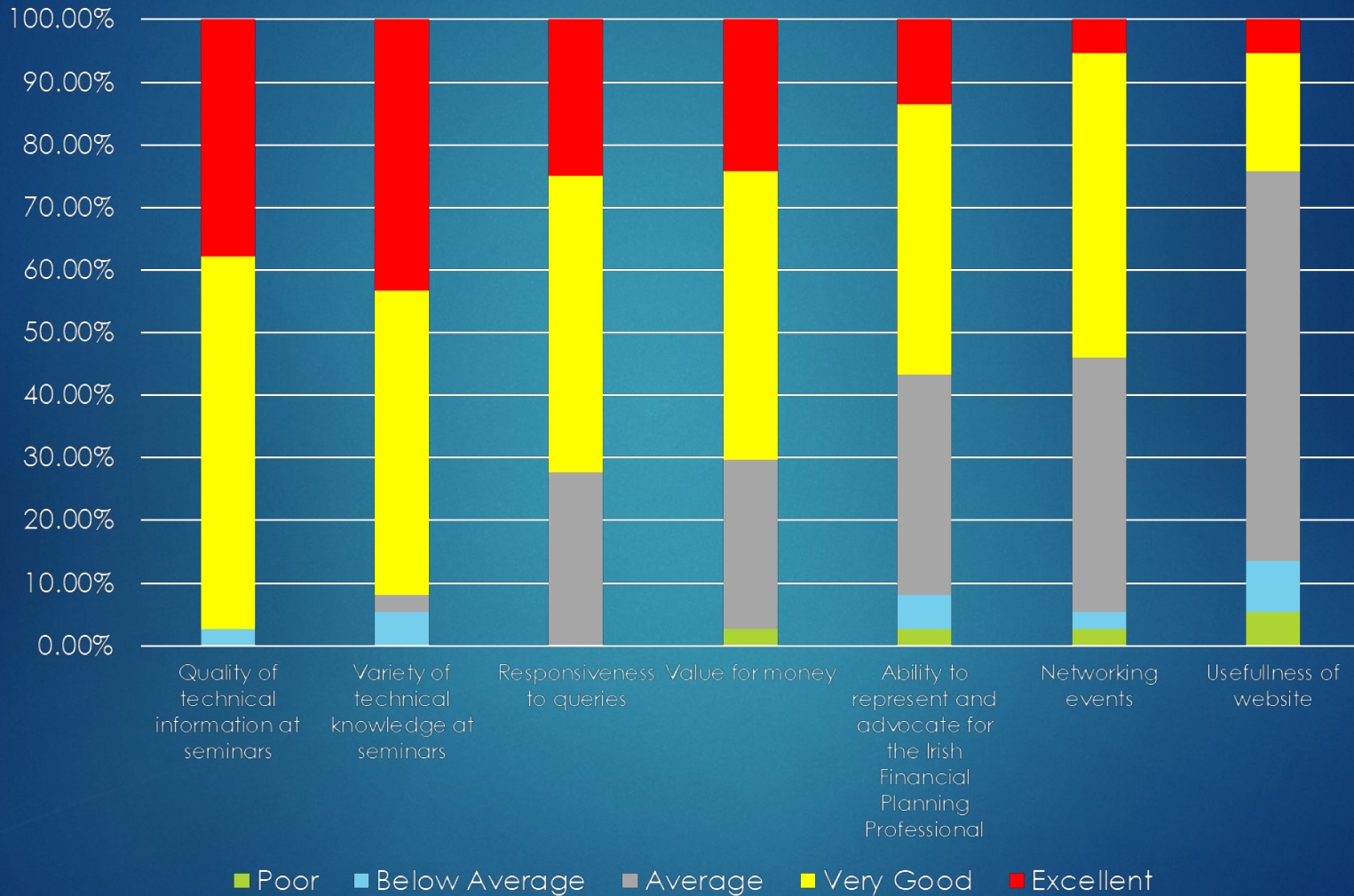
■ Knowledge development ■ CPD

■ Promoting profession ■ Advocacy

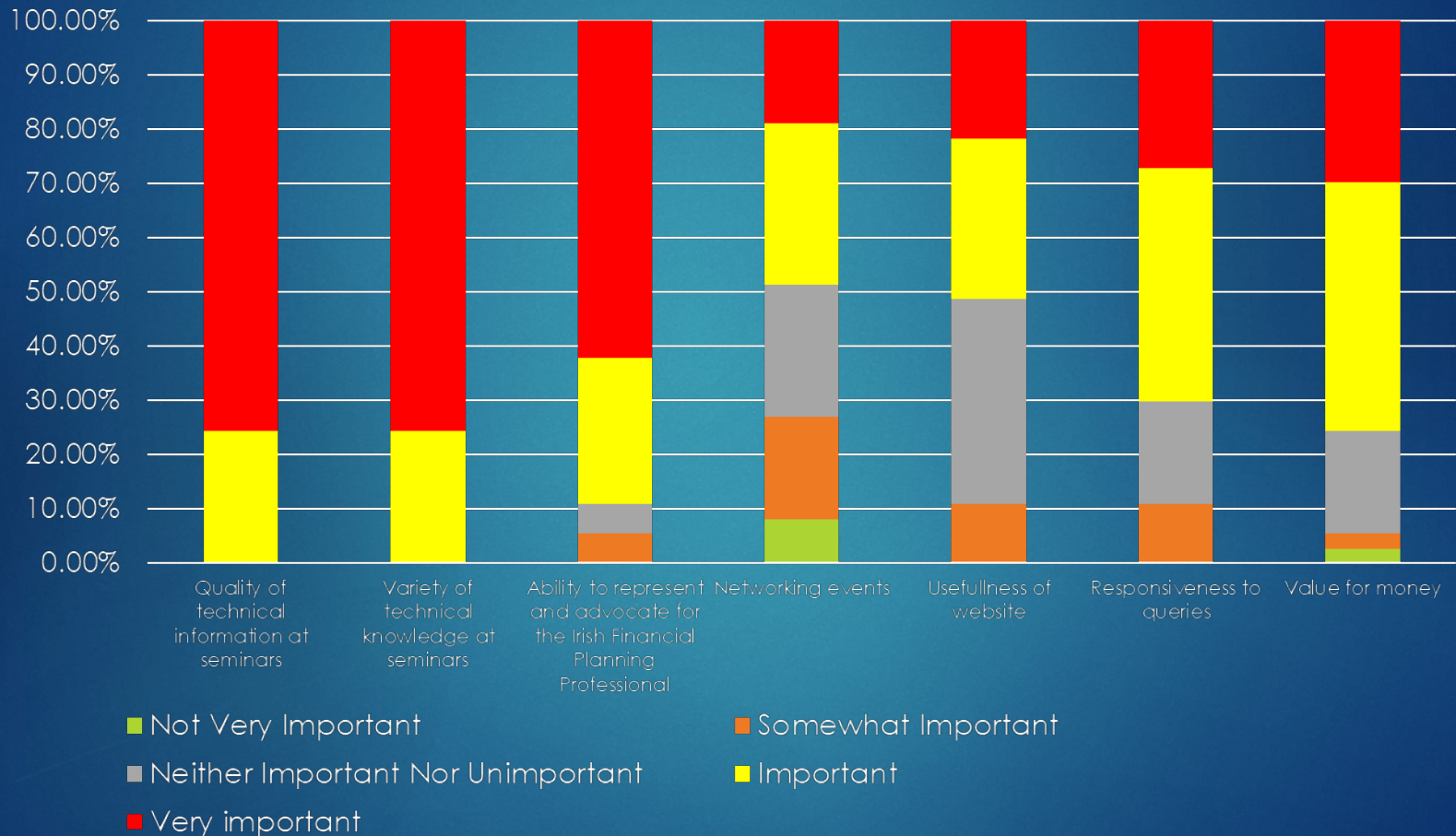
■ Networking

■ Other (please specify)

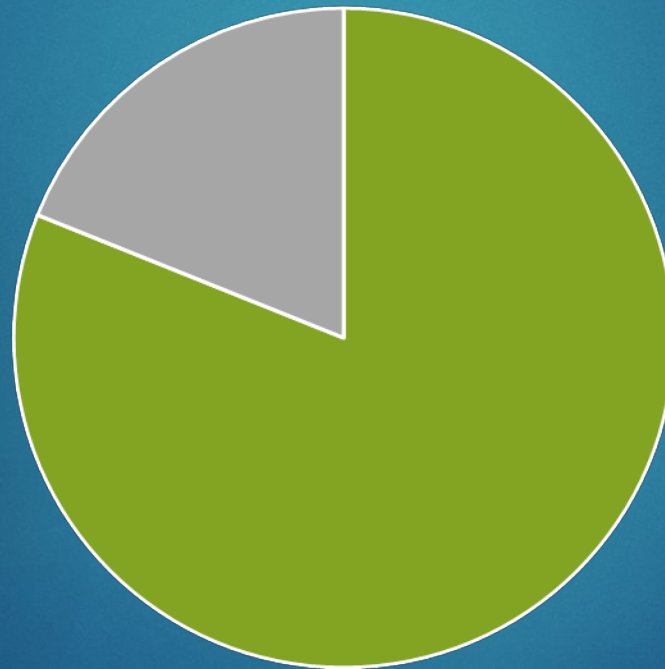
How would you rate the Society of Financial Planners Ireland on the following factors?



How important are the following services to you personally?



Overall would you say that the Society of Financial Planners Ireland has delivered on your expectations of it since you became a member?



■ Yes ■ No



Where the SFPI has not delivered on your expectations, can you explain why?

- ▶ Lack of differentiation - CFP vs other qualifications, SFPI vs other organisations
- ▶ Need for a more visible promotion strategy
- ▶ Education/seminars too academically focused

How likely would you be to recommend the Society of Financial Planners to a friend or colleague?

80% of you are likely to recommend the SFPI to a friend or colleague

YOUR SUGGESTED AREAS FOR IMPROVEMENT

- ▶ Raise national profile of the SFPI & Financial Planning
- ▶ Improvements to the SFPI website for members and the wider audience

Plan of action/call to action

- ▶ Continue membership growth

More roadshows


More regional events

Grad dip student awareness campaign

- ▶ Raise profile of SFPI – national & local media



- ▶ Seat at table at influencing groups e.g. Central Bank, European Writing Group
- ▶ Greater lobbying – with your help. What are your issues. Feel free to help us
- ▶ Continue to offer quality learning & development events
 - Webinar series
 - Q1 2020 conference



‘A journey of a thousand
miles begins with a single
step’

Lao Tzu