



Carla Brown FPFS, Chartered Financial Planner
Chair, PFS Board, and Immediate Past President

Sheffield CII Life & Pensions Society
21 October 2026



Advice is technical. Advice is human.

Knowledge

Pensions

Tax

Protection

Investments

Human judgement

Listening

Challenging

Simplifying

Trust enhancing

Not soft skills. Professional skills.



Professionalism earns trust.

8,500

Chartered Financial Planners

500

Chartered Financial Planning firms

Standards. Professionalism. Trust.



Chartered



Personal
Finance
Society

Opening doors to the profession.

£1 million invested over three years

500 aspiring professionals supported

120+ R05 passes

2 million UCAS campaign impressions

**invest.
inspire.
involve.
inform.**

Pathway to
the Profession



Personal
Finance
Society

Community. Collaboration. Connection.

Our profession is strengthened
by the relationships within it.



Personal
Finance
Society

Local insight. National strength.

Greater regional **autonomy**
Better central **support**
Ideas shared across the network

Powered by PFS volunteers.



Personal
Finance
Society

More ways to learn and connect.

Business of Advice Conference
Purely Paraplanning Conference
National Conference
PFS POWER
Festival of Financial Planning

*The Festival of
Financial
Planning*



Libby Greiwe



Steve Head



Sara Davies



Tim Peake



Personal
Finance
Society

Evidence. Expertise. Experience.

Road to Consumer Trust

Turning principles into better real-world outcomes

Managing Customer Vulnerability

Improving how needs are identified and shared

Great Wealth Transfer

Helping advisers build relationships



**Managing customer
vulnerability in insurance
and personal finance**

**A practical
implementation
guide**

cii.co.uk



Chartered
Insurance
Institute
Standards. Profesion.



Personal
Finance
Society

PFS Vision

“Our vision is that PFS members are universally regarded as the pinnacle of the financial planning profession, setting the benchmark for excellence, and inspiring public trust.”

Our Strategy 2028-32

What should we focus on next?





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Thank you

