



Personal  
Finance  
Society

Standards. Professionalism. Trust.

# Update from The PFS

## Future of the Financial Planning Profession

John White

Past President of the Personal Finance Society



# 2021 & beyond.....

## Personal Finance Society

Digital library



Delivering live and on-demand digital events to boost your CPD



## MY PERSONAL FINANCE SKILLS



## Financial Vulnerability Taskforce

**A SAFE PAIR OF HANDS**  
ftaskforce.com

United in meeting the needs of those in vulnerable circumstances



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# Sustainability of the financial planning profession



Next Generation of  
Advisers



Resilient business  
models



Client relationship  
sustainability

# Future of the Financial Planning Profession....

- We are a profession capable of rising to challenges & delivering great outcomes for clients
- Capable of rebuilding the nation's financial resilience back better post pandemic.
- Have your say: Look out for *“Shaping our Future Together”* .

# Any questions

Sarah Lord

President of the Personal Finance Society

