



INSTITUTE OF FINANCIAL PLANNING PRESS RELEASE

FOR IMMEDIATE RELEASE

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IFP to highlight real Financial Planning in Practice

- What really IS Financial Planning? Is it any different to what I already do?
- What are the core principles and processes involved? Does it mean I do a better job for my clients?
- Is it really the same thing as Financial Advice? Can I actually make more money out of it?

These are the kinds of questions advisers should now be asking themselves. They lie at the heart of a special full day conference from **Institute of Financial Planning (IFP) on Financial Planning in Practice**, which takes place **June 30 at The Village Hotel, Solihull, West Midlands**.

Given the changes proposed by the RDR post 2012, finding out about real Financial Planning is a must for advisers who wish to take full advantage of the huge opportunities that exist for Financial Planning firms over the next 5- 10 years.

One of the presenters at the conference, **Paul Etheridge MBE**, founder and chairman of the Prestwood group, former President of IFP and a CERTIFIED FINANCIAL PLANNER^{CM} professional, has a wealth of practical experience to share. He comments “

“Financial Planners are facing their most exciting opportunities ever if they rise to the challenge. This means terms of business to guarantee profitability, better preparation for meetings, using lifelong cash flow forecasts and planning with clients to help them achieve their desired lifestyle and avoid running out of money. Wonderful!”

The [programme](#) is aimed at:

- IFAs who want to find out what a real Financial Planning service looks like
- Existing Financial Planners or Paraplanners wanting to review core Financial Planning processes including the “six steps”

Experienced Financial Planners and other experts will be presenting sessions designed to inform, inspire and motivate delegates to provide the ultimate in client service through comprehensive Financial Planning. Members and Non-Members of IFP are welcome to attend.

Nick Cann, CEO of IFP comments: "IFP is working towards a powerful position where we can deliver a total career solution for Financial Planning businesses. IFP has access to all the leading Financial Planners in the UK via the CFP^{CM} mark, and also the leading Financial Planners in the world to help shape and build best practice. This event will set out the key requirements and opportunities that now exist. It will be an eye opener for many as they can "lift the lid" and see for themselves how the Financial Planning process can help them and their clients. It will particularly benefit those businesses and advisers struggling with some of the challenges posed by RDR."

Early booking rates apply until June 1st. Visit www.Financialplanning.org.uk for details.

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NOTES TO EDITORS

Institute of Financial Planning (IFP)

The IFP is the UK professional body of those committed to the development of the multi-disciplinary profession of Financial Planning. The IFP was formed in 1986 to:

- promote the profession and practice of Financial Planning
- increase public awareness of the need for Financial Planning
- raise standards in the quality of advice being provided to the consumer
- create a recognised professional qualification for its members
- ensure ethical standards through its Code of Ethics and Practice Standards
- encourage education in the theory and practice of Financial Planning
- share members' knowledge and skills with other professionals for the benefit of their clients
- establish a Registry of CERTIFIED FINANCIAL PLANNER^{CM} professionals

In the UK, the IFP is the exclusive licensee of the CFP^{CM} certification mark. It certifies, upholds and monitors the professional standards of Financial Planning practitioners to protect the interests of members of the public, thus ensuring that they receive proper financial advice at all times. The CFP mark represents Financial Planning's highest professional standard and is the global symbol representing excellence in Financial Planning.

The IFP serves a membership of over 2000 members and 900 CFP professionals through a programme of national events and training courses, and a regional 'Branch Network' centred around 20 areas. Membership is drawn from across the financial services community.

www.financialplanning.org.uk