

# Annual Report: 2019-2020



The Insurance  
Institute of Leicester  
Chartered Insurance Institute

## Introduction

Under the leadership of our President, Julie Rayson-Flynn Cert CII, we have had another successful year. Both General Insurance (GI) and PFS CPD events have been particularly well supported this year. The young members Next Generation group is cementing its position. We have raised the highest sum for charity in several years – nearly £7,500 - thanks substantially to the President's 'Seatathon'.

## Communication

Our preferred method of communication is now by e-mail and our website. It is now possible to give permission to receive e-mails from your local Institute whilst not receiving those from the CII (if that's your preference). Log into Membership Up-date details on the CII website: [www.cii.co.uk](http://www.cii.co.uk) At the foot of the page, tick the 'sharing your data with local institutes' box. Or check the news item on our own website [www.localinstitutes.cii.co.uk/leicester](http://www.localinstitutes.cii.co.uk/leicester) as a reminder. PLEASE! We can now contact 64% of members by email compared to 60% last year – slow but steady progress! And don't forget you can follow us on twitter: go to @the\_iiil.

## Education & CPD Support

The main purpose of the Institute is to support relevant education. We delivered a wide range of Continuing Professional Development (CPD) events during most of 2019/20. COVID-19 has, of course, affected our recent programme. The full list of events that we ran: lunch time seminars, and half-day and full-day workshops is in the table below. If you haven't attended one of our events, make a diary note to check our website around the end of August and then monthly afterwards: [www.localinstitutes.cii.co.uk/leicester](http://www.localinstitutes.cii.co.uk/leicester) Our events page also provides links to the CII's video and audio lectures. Other material is at the CII's Learning Content Hub.

## Examinations and Qualifications

We continue to be an examination centre. Written examinations were provided at Devonshire Place on London Road. In April 2019 (75 candidates took 13 subjects) and in October 2019 (76 candidates took 13 subjects). General insurance is moving to assessed work rather than exams, so the subjects were all PFS. The April 2020 written examinations were cancelled by the CII due to COVID-19. On-line examinations have been held at the Pitman Centre on King Street, although they too are currently cancelled.

This year's prize-winners were:

Best Associateship performance: **Oliver Senogles** APFS, Efficient Portfolio (Oakham). £500 and Papworth Plate.

Best Diploma performance: **Francesca Hayes**, Mansion Park (Ashby de la Zouch), £250 and Mowatt Plate.

**Christopher White** FPFS, Regent Financial Management (Ashby de la Zouch) achieved Fellowship of PFS. He received a cheque of £200 and the Mellor Plate.

For the first time in very many years, there were no new ACIIs in Leicester. Congratulations to **Nicola Clews** (AXA), **Daniel Harrison** (BHIB) and **Joanne Knock** (Adler Insurance Brokers) who achieved Dip CII. Including PFS designations, there have been two Fellowships, nine Advanced Diplomas, 57 Diplomas and 80 Certificates over 12 months. Unfortunately the CII is unable to tell us new PFS designations on a regular basis.

## Sports & Social Events

Leicester City Transport's classic 1961 Bristol double-decker bus was called into service again on 28 June to transport 22 members through South Leicestershire countryside for the annual Rural Hostelry Excursion. A good time was had by all. Quizmaster **Mal Fairhurst** ran our Annual General Knowledge Quiz on 14 November at the University of Leicester. 20 teams competed. The winners were a team from Brokerbility captained by this year's president, **Julie Rayson-Flynn**. A mere 1½ points separated the next four teams from True Potential Wealth, Boolers, Turners and Building & Land Guarantees.

The winning team at the Music Quiz on 12 March (also run by **Mal Fairhurst**) was from BHIB, captained by past president **Brian Brookes**. BHIB's other team (whose captain will remain nameless) received the wooden spoon. Prizes were sponsored by Building & Land Guarantees.

The annual five-a-side football competition has been cancelled due to COVID-19.

Watch out for the return of our popular Treasure Hunt on Foot, restrictions permitting.

# Annual Report: 2019-2020



The Insurance  
Institute of Leicester  
Chartered Insurance Institute

## Next Generation

The feedback from their members is that our young professionals' group wants to expand its networking horizons by engaging more with other professionals, primarily Leicester's Hotshots – watch this space. A 'shadow council' has been set up to give those who are interested a better understanding of the roles on main council of the Institute. Two Next Gen members attended January Council as observers. On the social side, the last event was a meeting and lunch at the Tigers ground on 29 February prior to the match against Worcester (which Tigers won), kindly hosted in their box by Gallaghers. **Kassim Ditta** (BHIB) will shortly take over as the chairman of the Next Generation group.

The winners of our 2019 High Achiever Award were **Ben Wooltorton** (Michael Ambrose) and current Next Gen chairman **Florence Dennis** (Gallaghers). Both received a cheque for £150, a trophy and certificate. Runners up were **Alpesh Patel** and **Tom Palmer**, both of Berkeley Insurance Group, who received £75 and a certificate. Sponsors were Aspects and Fairstone.

## Charity Support

Our President's chosen charities this year was the Matt Hampson Foundation. Most members will be aware that, following his accident in 2005 during an England under 21 training session, the former Tigers player is the embodiment of the Foundation's ethos of 'Get Busy Living'. To personally support the charity, President **Julie Rayson-Flynn** has raised over £2,000 by organising and participating in a 'seatathon'. The challenge was to sit on all 10,500 seats in the Holland and Barrett stand at Welford Road. On Friday 13th March, Julie plus team including, **Florence Dennis, Kassim Ditta, Sue Hull, Clare Kitchener, Chris Macleod, Adrian Mee** and **Mary Rogerson** completed the challenge in just over four hours in a relay. (The just-giving page is still open if you want to donate: [www.justgiving.com/theiil](http://www.justgiving.com/theiil) )

£3,500 was raised at the Annual Dinner for the charity.

£200 was raised for Insurance Charities on Charities Day, 21 June, by selling cakes at insurance and financial planning offices and another £153 doing the same at Christmas. Special thanks to **Zoe Edwards** and **Matthew Undenge**.

£103 was raised for Insurance Charities at the General Knowledge Quiz and £70 at the Music Quiz.

We have four active beneficiary cases in our area. We have also been able to link one enquiry to support in another area. The member was 'delighted'.

## Annual Dinner

188 guests joined 86 members at our 2019 Annual Dinner on Friday 1 November at the Marriott Hotel in Leicester. The CII's Professional Standards Director, **Melissa Collett**, gave an entertaining talk which included reference to the early days of the CII and, surprisingly, how relevant the same principles are today. The Lord-Lieutenant of Leicestershire, **Mike Kapur**, attended in person and presented a medal to **Julie Rayson-Flynn** for long service in the RAF Air Cadets. Our dinner sponsors were Allianz, Arch, AXA PPP, BHIB, Brokerbilty, Fairstone, Gallagher, Anthony James, Markel, Mattioli Woods, Momentum, RSA, Sedgwick and Zurich.

## Membership

Our membership continues to increase steadily. 216 members joined, re-joined or transferred in. However, 142 members lapsed or resigned, six transferred out and, sadly, one died. **Vicky Mortimer** of Oakham, age 26, was killed in a traffic accident whilst out with her cycling club. She joined CII in March 2017 and had achieved Dip PFS.

The net result of the changes is that we now have 1,573 members, up by 67 (nearly 5%) over the year. 862 (55%) are in general insurance (GI) and 711 (45%) are in personal finance. 241 members are Chartered – 'the gold standard'. We have 82 Fellows, 236 Associates, 473 Diplomas and 302 Certificates.

# Annual Report: 2019-2020



The Insurance  
Institute of Leicester  
Chartered Insurance Institute

## Careers

We've attended at a Jobs Fair in the City Rooms and a careers event at Roundhill Academy in Thurmaston. Good work by **Sue Dexter, Kass Ditta, Clare Kitchener and Florence Dennis.**

We are currently consulting larger employers in our area about their strategies for employing all levels of apprenticeships. Is there scope to create a local CII Aspire cohort and would this be advantageous to apprentices and/or employers? If any member thinks they could benefit, please contact our Careers Officer.

## Regional & National

The Regional Forum has been reorganised this year, West Midlands merging with us in the East Midlands. Leicester has been actively involved and represented at all meetings. Leicester member **Grant Scott** is coming to the end of his term as Vice President for Local Institutes, a national position that involves liaison with the CII Board. We were represented at the annual CII Network Conference by Deputy President **Adrian Mee** and **Julie Rayson-Flynn** in York in June. **Janice Fielding** represented East Midlands at the annual PFS Officers Conference in January.

## Table of CPD Events

Date	Event & Venue	Topic	Sponsor	Attendance
4 Sept 2019	Lunchtime Seminar Mercure Grand	'Salisbury Novichok Poisoning.' BI policy cover. Damian Glynn FCA FCILA, Head of Financial Lines, Sedgwick.	Brokerbility	46
12 Sept	PFS Morning Seminar Hilton, Leicester	'Protection Advice Matters'. Stephen Fallon, Legal & General- Individual Protection & Adam Hough Aviva – Business Protection.	Legal & General. Aviva	44
2 Oct	Lunchtime Seminar Mercure Grand	'The Impact and Effects of the Grenfell Tragedy'. Rob Dakin Dip CII, Head of Business Resilience, AXA	Gallagher	59
3 Oct	PFS Revision Day Brewin Dolphin	AF7 Pension Transfers, Revision Day. Steve Davis FCII FPFS. Financial Adviser Academy	Brewin Dolphin	11
4 Oct	PFS Revision Day Brewin Dolphin	AF4 Investment Planning, Revision Day. Steve Davis FCII FPFS. Financial Adviser Academy	Brewin Dolphin	6
6 Nov	Lunchtime Seminar Mercure Grand	'Modern building construction and how to classify it for pricing.' Rob Dakin Dip CII, Head of Business Resilience, AXA	Abaco	41 (3 non-CII)
12 Nov	PFS Seminar 11-12.30 Charles Stanley office	Investment Update covering AIM investments, Passives and a current market overview. Jeremy Hippolite FPFS IMC, Head of Asset Management, Charles Stanley and Andrew Baker, Chartered FCSI, Senior Investment Manager, Charles Stanley.	Charles Stanley	17
4 Dec	Lunchtime Seminar Mercure Grand	Case Law – Factory Fire Scenario - James Thompson and Neil Frankland, Mills and Reeve LLP	Momentum	49 (1 non-CII)
08 Jan 2020	Lunchtime Seminar Mercure Grand	'Dalamd' – Fire case: How authority impacts causation analysis. Jonathan Herne, Mills and Reeves LLP	Arch Insurance	45 (3 non-CII)
4 Feb	Full Day Seminar College Court	GI Revision Day – Insurance Law MO5 Rod Smith FCII FCILA, Intrinsic Training.	-	10
5 Feb	Lunchtime Seminar Mercure Grand	'Terrorism – A Dynamic Risk.' Warren Haydock ILASA, Claims Manager, Pool Re	Arch Insurance	48 (1 non-CII)
26 Feb	Lunchtime Seminar Mercure Grand	'Outlook for the UK Economy.' Rosie Smith BSc MBA, East Midlands Agent, Bank of England.	Berkeley Insurance Group	111 (5 non-CII)
4 Mar	Lunchtime Seminar Mercure Grand	'Insurance & Artificial Intelligence'. Nic Hartley, Head of Innovation, Ecclesiastical Insurance.	Direct Commercial	40
3 April	PFS Revision Day	AF7 Pension Transfers, Revision Day. POSTPONED. Steve Davis FCII FPFS. Financial Adviser Academy	Brewin Dolphin	

# Annual Report: 2019-2020



The Insurance  
Institute of Leicester  
Chartered Insurance Institute

## Financial

This year we administered a budget of £56K, 12% up on last year. This was due mainly to the increased number attending the Annual Dinner. Our income is made up of a grant from CII (based on a percentage of the total of IIL members subscriptions to the CII), sponsorship and member contributions for events. Our performance-related grant from the CII was £19K, 4% more than last year.

Our performance as an Institute was assessed by the CII at 95.5%. Next year's grant is based on an assessment of 98%. Most of our grant is spent on CPD activities. The remainder of the income is due to the efforts of Council and the generosity of both sponsors and members. We have a surplus of approximately £8K to carry forwards to next year. If you would like to see our accounts in full, please email: [Treasurer@theiil.org.uk](mailto:Treasurer@theiil.org.uk)

## AGM and Contact

If you would like to assist with any CPD or social events, or join our council please contact us: details on our website. The Annual General Meeting is scheduled for Wednesday 22 April at 6pm. The physical meeting at the Marriott Hotel is cancelled but we'll be having a virtual meeting via Zoom. Details are on our website. Do join us.

## Council

Your Council for 2019/2020 was:

President: **Julie Rayson-Flynn** Cert CII (Brokerability)

Deputy President: **Adrian Mee** B Sco SC (Hons) Dip PFS

Secretary and Dinner: **Mary Rogerson** (BHIB)

Treasurer: **David Hutchinson** Dip CII (Abaco)

Education/CPD: **Allison Marshall** (Aspects)

PFS: **Janice Fielding** FCII FPFS, Chartered (Fairstone)

Membership and Regional Forum: **Keith Torrance** FCII DMS MCMI Chartered (Torrance Associates)

Careers: **Sue Dexter** Cert CII (Brokerability)

Charities: **Sue Banbury** Dip CII (University of Leicester)

Examinations and Diversity: **Bruce Teago** ACII

Sports/Social: **Deb Southwick** ACII, Chartered

Next Generation: **Florence Dennis** Cert CII (AJ Gallagher)

Communication: **Samuel Back** Dip PFS (Mattioli Woods)

Immediate Past President: **Christopher Macleod** Cert CII (RSA)

**Martin Briers** MPhil FCII, Chartered

**Rebecca Dougan** (RSA)

**Clare Kitchener** Dip CII (BHIB)

**Andy Miller** Dip CII (Enable Insurance Services)

**Grant Scott** ACII, Chartered (Perry Appleton)

**Alasdair Walker** FPFS, Chartered (Hunter Aitkenhead Walker)

**Pete Willcocks** BA (Hons) MSc FCII Chartered (Larsen Howie)

**Bruce Teago** and **Pete Willcocks** are stepping down from Council at the AGM. Both are past presidents – Pete in 2016/17 and Bruce back in 1995/96. Their experience will be missed.

April 2020