



President's Round Up – Mark Longford Community In Action!

With three editions of Simply remaining under my watch, I wondered what to write this week. Then I met Charlotte Penson (Community Team Leader) for a planning lunch and came away inspired!

Charlotte embodies all that we have been seeking to achieve since she joined our 2020 Vision group nearly four years ago. Charlotte has a demanding day job as Compliance Supervisor at In Partnership, has recently become engaged, moved house and is planning for her wedding later this year. Alongside all this, as a committed member of the Community Team, Charlotte took over the lead in December and has exciting plans for us this year. Sussex CII has an enviable reputation for delivering high quality events and we are reaching out to members and employers through our team of Company Champions. I was thrilled to read Diana's article below as charity is central to the Community team.

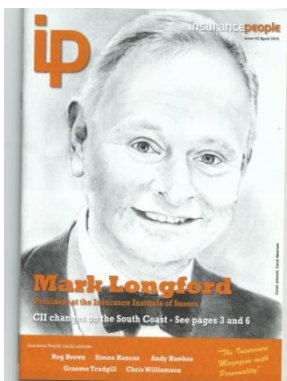


When I step down later this month, I'm delighted that I will become a member of Charlotte's team and helping to deliver the team's programme. By then we will have output from the IIS Spring Survey which will drive the Community initiatives forward.



Secretary's Soundbites ('Susan's Stamp!')

A very warm welcome from Sussex



It's unbelievable that we have been 'Sussex' for almost a year now. The seeds were sown just after our Centenary in 2012 and what a long way we've come since last April's AGM! Our re-branding has revitalised us and been a total breath of fresh air – a chance to reach out to all sections of our membership and the community, and be welcoming and inclusive, yet still maintaining the CII's high standards of professionalism and excellence. I'm always delighted when we are given the opportunity to spread the word. What a lovely surprise to see Mark's face beaming out from the cover of this month's 'Insurance People', plus an interview with him telling the IIS journey and also a little about his own career history.

Why not take a look at the online version by visiting: <http://www.insurancepeople.uk.com/>

And there is more about IIS in the latest edition of **‘Financial Solutions’ magazine** for PFS members, including how we are meeting their needs by providing a selection of financial services and relevant soft skills seminars. The article also mentions that subject to election in April, Richard Cohen will become the next president of IIS and that he was also recently elected chairman of the Sussex Personal Finance Society.

This leads me in nicely to tell you about our special event on 27 April at the Birch Hotel, Haywards Heath. We start with a short AGM, when Richard and our other nominees will seek election for various officer and council roles and Richard will reveal his exciting plans and vision for the next year. Then the informal part, our Presidents’ Evening will start: to celebrate not just one but two presidents - Mark as outgoing and Richard as incoming. Here is a chance to chat to them both over drinks and a buffet and get to know your new council team. Do come along and join us as we would love to see you. Just visit <http://www.localinstitutes.cii.co.uk/sussex/home/> to book your place online.

I hand you over now to this week’s guest contributor, our very own Diana Webley Ward.

Personal finance inclusion in Sussex

The renaming of the Insurance Institute of Sussex, formerly the Insurance Institute of Brighton, has given the council an opportunity to become more inclusive.

This year, the team saw many of the graduates from its 2020 regeneration initiative take seats on the council, resulting in a younger and more diverse group.

Personal Finance Society members are well represented and funding was approved to provide seminars that reach out to meet their needs. These have included talks on the new pensions landscape, effective sales techniques, networking and presentation skills.

At the centre of these initiatives has been the introduction of a community group, which ensures the Institute connects with all members. One of the most successful events was inviting retired colleagues to afternoon tea in Sussex. Many of the attendees had worked in life and pensions and conversations were varied, with anecdotes and a strong interest in the next generation of advisers and insurers.

Subject to election in April, Richard Cohen, FFPC, will become the next president of the Insurance Institute of Sussex. Mr Cohen was also recently elected chairman of the Sussex Personal Finance Society.

Follow the Insurance Institute of Sussex on Twitter and LinkedIn or visit: www.cii.co.uk/sussex to find out more.

Pieces of Eight - Ahoy me hearties!



Not the usual greeting from one of your council members, but I thought you would enjoy the photo of me ready for Pirates’ Day at the Maritime Museum with my 4 year old grandson.

However I am after your money and support.

I am the Insurance Charities Representative for the Insurance Institute of Sussex and during the week of 20 – 24 June we will be running an awareness campaign in workplaces. There will be display boxes containing chocolates, pens and other branded items. Please help yourself to use and enjoy, in return for a generous donation.

Every year I am approached by people who have worked in our industry, but who have fallen on hard times. I make initial enquiries about their situation and then arrange a visit to their home. Here I conduct an in depth interview and review their financial, physical and emotional situation carefully. I can find myself dealing with both young and old people, former senior managers and call handlers. After taking copies of relevant documents, I prepare a detailed report to submit to the Insurance Charities Board in London.

Then after help is approved, I will revisit the applicant to ensure there is an improvement in their situation or further aid is required. After that I conduct an annual assessment visit to gauge necessary changes in aid levels.

Sometimes I feel that expert advice is needed by the applicant and the Charities have access to many diverse experts. So the help that the Charities give to people is not solely financial, but they need money to be able to fund their work.

Obviously my work is confidential, but it can be so rewarding. Helping an elderly, infirm lady with her finances and then discovering on a tour of her flat that her bedroom carpet was so worn, as to be dangerous. Her delight when I recommended and had approved a new carpet was wonderful and we had tea and cakes to celebrate!

Particularly satisfying are situations involving children and the difference the Charities can make to their lives, from providing beds and furniture for small children when fathers struggle to care for them alone following bereavement; to giving Scout uniforms and money for annual camp to single parent families. I have organised retraining courses for redundancy victims and housed dogs in kennels for a homeless person.

Each approach I receive is carefully evaluated. I have been DBS checked and carry an ID card for the applicant's reassurance. Sometimes I judge that I may be vulnerable in a situation and then I take my husband with me. I try to visit where the person is living to see for myself what the situation is and I have to be given totally free access for an application to process. If the applicant is homeless, then we have to meet in a cafe - wearing a red carnation, of course!

Most beneficiaries, regardless of continuing help, receive a Christmas hamper from the Charities and regular checks on their ongoing situations.

Please look at the website to see the stories that the Charities have helped across the country:

www.theinsurancecharities.org.uk/our-impact/

Please also feel free to pass my details on to anyone you know, currently in the industry or formerly working in any branch of insurance, who is struggling with tough times and could do with some help. My email is dwebley2@toucansurf.com.

Remember plenty of **Pieces of Eight** in the Charities boxes in June for our good work to carry on. If you don't have an IIS Company Champion in your office, contact me directly to arrange a display box.

Diana Webley Ward

Best wishes.



www.sussexcii.org.uk



@sussex_cii



Sussex CII (IIS)





April	May	June	July
		<i>EU Referendum</i>	<i>Add N</i>
Fr	1 Su	1 We	1 Fr
2 Sa	2 Mo <i>May Bank Holiday</i>	2 Th	2 Sa
3 Su	3 Tu	3 Fr	3 Su
4 Mo	4 We	4 Sa	4 Mo
5 Tu <i>Eastbourne Pier fire AF</i>	5 Th	5 Su	5 Tu <i>Croquet Evening</i>
6 We	6 Fr	6 Mo	6 We
7 Th	7 Sa	7 Tu	7 Th
8 Fr	8 Su	8 We <i>Technology & the future</i>	8 Fr
9 Sa	9 Mo	9 Th	9 Sa
10 Su	10 Tu	10 Fr	10 Su
11 Mo <i>CII Written Exams</i>	11 We	11 Sa	11 Mo
12 Tu <i>CII Written & PFS Q2</i>	12 Th	12 Su	12 Tu
13 We <i>CII Written Exams</i>	13 Fr	13 Mo	13 We
14 Th	14 Sa	14 Tu	14 Th
15 Fr	15 Su	15 We	15 Fr
16 Sa	16 Mo	16 Th	16 Sa
17 Su	17 Tu	17 Fr	17 Su
18 Mo	18 We <i>CII NC2016</i>	18 Sa	18 Mo
19 Tu	19 Th <i>Jt Network Event Btn U</i>	19 Su	19 Tu
20 We	20 Fr	20 Mo	20 We
21 Th <i>Structural defects PB</i>	21 Sa	21 Tu	21 Th
22 Fr	22 Su	22 We	22 Fr
23 Sa	23 Mo	23 Th <i>EU REFERENDUM</i>	23 Sa
24 Su	24 Tu	24 Fr	24 Su
25 Mo	25 We	25 Sa	25 Mo
26 Tu	26 Th <i>D&O talk</i>	26 Su	26 Tu
27 We <i>AGM/Presidents' Eveni</i>	27 Fr	27 Mo	27 We <i>Brighton Sewer tour</i>
28 Th	28 Sa	28 Tu <i>UK Flooding SS</i>	28 Th
29 Fr	29 Su	29 We <i>PFS Q3 Conf</i>	29 Fr
30 Sa	30 Mo <i>Spring Bank Holiday</i>	30 Th	30 Sa
<i>Network News deadline 2 May</i>	31 Tu		31 Su