

Implementing the Retail Distribution Review: New Workshops

18th October 2011

Award-winning Chartered Financial Planners Informed Choice are running a series of practical one-day workshops for IFAs.

The workshops follow a series of popular Open Days hosted by the firm at the end of last year. Those who attended got to share with like minded IFA practitioners our approach to building an RDR-ready business as well as best practices in marketing, investment advice and processes.

As a result of the popularity of these Open Days, Informed Choice has decided to host a series of workshops to help other IFA firms successfully implement the RDR requirements.

Informed Choice executive director Nick Bamford, who is hosting the workshops, said:

“There is a lot of great theory about the change process that will enable an IFA firm or individual adviser to get ready for the RDR. No doubt this theory is important in helping advisers develop their strategy, but the practical experience behind our workshops is in short supply.”

“We aim to share two important things in this workshop; the things we have got right and the things we have got wrong! We are not claiming to have designed the perfect IFA business model but the feedback we received from our Open Days is that sharing our experiences of change is massively beneficial.”

Places at the workshops are available at £295 per delegate, including a working lunch and package of documentation to assist with forming an RDR-ready proposition.

News Release from Informed Choice

Each one-day workshop is limited to a maximum of six attendees to ensure maximum value for each delegate.

Nine workshop dates have been announced at venues in Surrey, London, Bath and Cheshire. Each workshop runs from 10am until 4.30pm. More details and a booking form can be found at www.brilliantwithadvice.co.uk/workshop.

More information

Informed Choice Ltd is a firm of Chartered Financial Planners based in Cranleigh, Surrey.

We were named Best IFA Firm at the unbiased.co.uk Media IFA of the Year Awards 2011. Executive Director Nick Bamford is an experienced Chartered Financial Planner and the previous chairman of the Society of Financial Advisers.

Resources for journalists, including high resolution photographs, are available at <http://www.icl-ifa.co.uk/resources/newsroom/>.