



IFW Corporate Membership

What is the IFW?

An independent, not for profit membership organisation engaging with financial advisers, coaches, planners and paraplanners, promoting and advising upon financial wellbeing practices and behaviours.

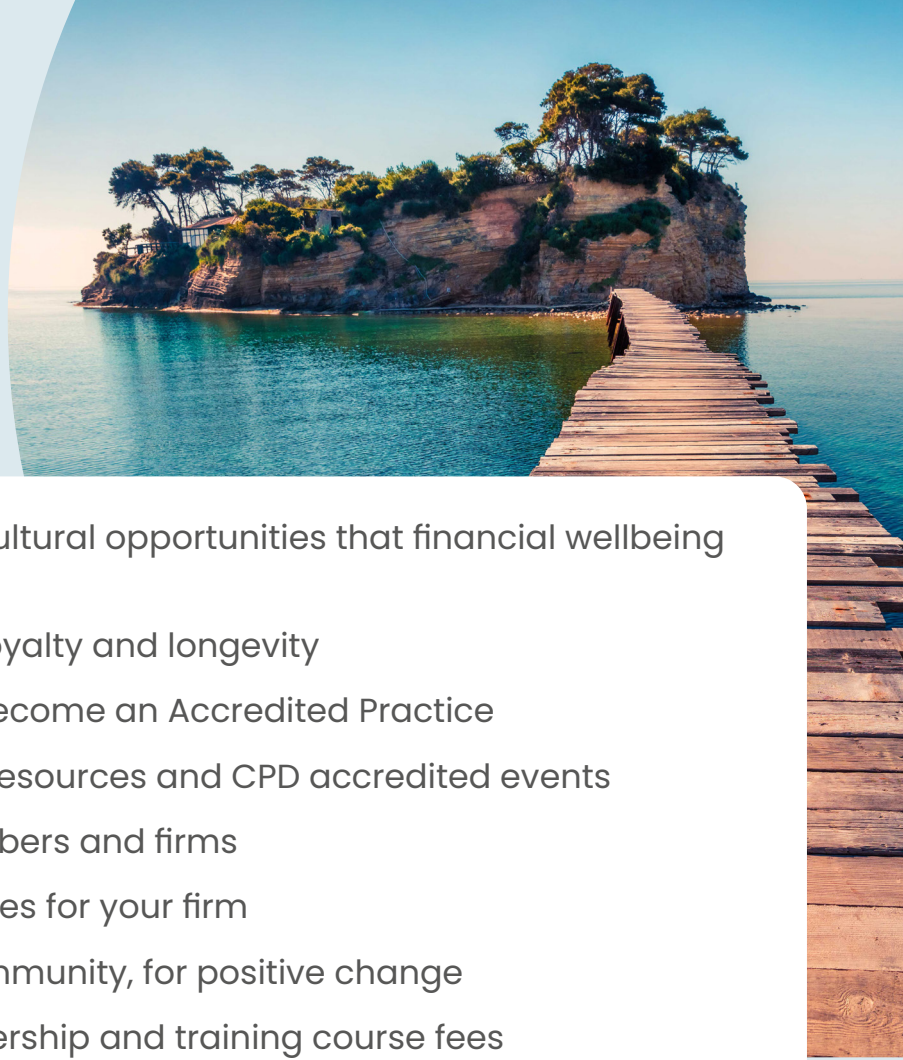
What does the IFW represent?

Creating societal good by developing a community of like minded individuals who can share and learn from each other to deliver client centred financial planning that focuses upon the outcomes that the client wants.

What is Corporate Membership?

When a firm commits to the IFW at a company rather than an individual level, receiving discounts on fees, a package of marketing activities and the opportunity to become an Accredited Practice.

Why become a Corporate Member...



- Access the commercial and cultural opportunities that financial wellbeing practices can provide
- Benefit from improved client loyalty and longevity
- Completing the IFW Audit to become an Accredited Practice
- Access to financial wellbeing resources and CPD accredited events
- Engage with like minded members and firms
- Develop best practice processes for your firm
- Become part of a growing community, for positive change
- Enjoy bulk discounts in membership and training course fees
- Debate what financial wellbeing practices look like at Regional Meetings and the monthly Roundtable, Wellbeing Cafe and Forum events
- Marketing activities to include one internal IFW webinar, monthly newsletter, quarterly content for outbound communications, visibility on our website and complimentary access to the IFW Audit (worth £600).

Joining fee:

£2,750 + vat per annum to receive all of the above. Excludes membership fees.

Thereafter you can also consider other activities, such as:

- The funding of research / white papers
- Speaking at and sponsoring the IFW Conference
- Completing the Financial Wellbeing Certificate programme
- Engaging with IFW accredited training programmes
- Ordering copies of the Financial Wellbeing Book

These activities will be costed individually.

To join as a Corporate Member please email our CEO at nick@ifw.org.uk



www.ifw.org.uk



members@ifw.org.uk



Queen Square
House,
18-21 Queen Square,
Bristol, BS1 4NH



f



in