



What is an IFW Member?

While IFW membership is open to everyone, our work primarily aims to support the development of financial advisers, planners, paraplanners and coaches. The IFW is a meeting place for anyone who is interested in sharing good practice or learning about the principles of money and happiness and helping clients with their financial wellbeing to make them more fulfilled, not just wealthier.

To join, prospective members simply need to go to <https://instituteforfinancialwellbeing.com/join-initiative/> and click on the link to join. This will take them through the registration process.

- Individual members:** Individuals who work primarily within the financial advice, planning, or coaching communities.
- Corporate members:** Larger advice firms who wish to offer membership of the IFW as an employee benefit.
- Partner members:** Commercial organisations wishing to support our work may apply to become Partner Members.
- Associate members:** including professional bodies (PFS, CISI, TISA, London Institute of Banking & Finance, etc.) and non-profit and charitable organisations with an interest in the topic of money and wellbeing



What benefits come with IFW membership?

Individual members are entitled to the following benefits:

- A meeting place to explore and promote financial wellbeing
- Unlimited access to our membership portal of curated and bespoke financial wellbeing resources
- Paid access to accredited learning programmes (and frequent member-only discounts for these)
- Unlimited access to our members-only online community
- Access to bespoke financial wellbeing research white papers at no extra cost
- Access to monthly Roundtable discussions, Wellbeing Café lunch and learns and learning discussions at Tools & Tactics sessions at no extra cost
- Special member prices on IFW Conference tickets

Corporate membership includes all of the above, plus:

- Opportunities to get involved with bespoke financial wellbeing research including options to influence and fund or co-fund the research paths we select
- A monthly Corporate newsletter on upcoming IFW events issued to a contact at your company
- The option to take part in quarterly update sessions to track progress and engagement, and share your own news
- Visibility on the IFW website as a company at the forefront of financial planning, including your company logo and bio
- Discounted IFW membership for you and your employees
- Discounts on IFW Conference tickets for you and your employees
- Exclusive webinars, content and talks on financial wellbeing for you and your employees
- Opportunities to exhibit at real world events such as the IFW Annual Conference



For partner members, benefits include the option to:

- Support a major UK financial advice initiative
- Support and get involved in research projects
- Produce white papers and develop tools
- Take advantage of speaking opportunities
- Opportunities to exhibit at real world events such as the IFW Annual Conference
- The ability to use the IFW logo
- Visibility on the IFW website
- Input and access to survey IFW members

Thereafter, the package can be personalised for the Partner Member.

How long does membership last and how is it renewed?

Individual membership is automatically renewed each month, quarter or year depending on the original subscription. Membership can be cancelled at any point without notice but refunds will not be provided for fees already paid.

Partner membership expires annually with the opportunity to renew subject to approval of the Membership Committee.

What fees are payable?

Individual members pay a monthly fee of £15 exclusive of VAT.



In what situation can members be barred or removed?

Individual members can be removed in the event they do not adhere to the principles of the IFW, misuse the IFW brand or behave towards other members or the IFW team in a way that is deemed inappropriate or harmful. Removal is via a referral to the Membership Committee, and may be appealed.

Any attendee of an IFW online event is expected to behave in a way that is respectful and courteous to other attendees, especially in instances where they feel moved to express differences of opinion. If an IFW-appointed facilitator feels this is contravened, individuals may be ejected from the event.

Partner members may be barred or removed in the event they do not fulfil the membership criteria or adhere to the principles of the IFW. Any decision to bar a prospective member or remove them is taken by the Membership Committee.

How are membership terms/fees reviewed and amended?

Membership terms and fees are reviewed annually by the IFW Board.

How does a member leave?

Members can leave the IFW by providing written notice by email to members@ifw.org.uk.