



RESEARCH

in association with



AIFA PR Meeting

January 5<sup>th</sup>, 2006

The logo for 'ifa census'. The word 'ifa' is in a light blue, lowercase, sans-serif font, and 'census' is in a white, lowercase, sans-serif font. Both are centered within a large, dark blue circle. The background of the slide is a light blue grid of semi-transparent circles.

ifa  
census

**The Definitive Source  
of IFA Opinion**

The logo for 'ifa census' is displayed within a dark blue circle. The word 'ifa' is in a smaller, lowercase font above the word 'census', which is in a larger, lowercase font.

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## Sponsored events

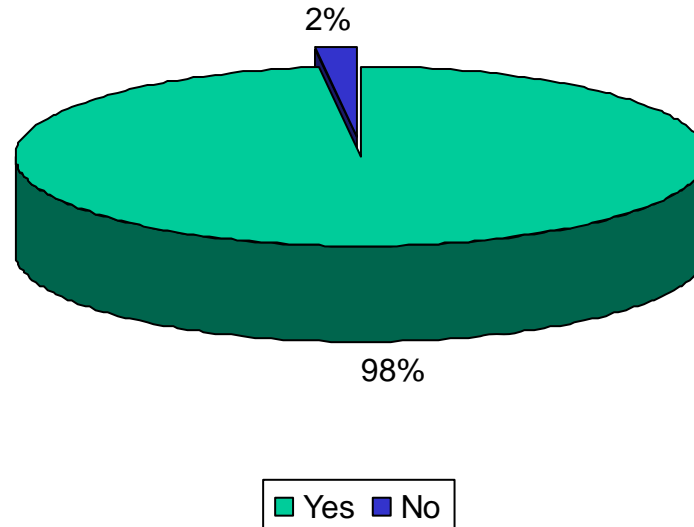
- The following AIFA questions focused on IFA views on AIFA sponsored events.
- Questions were placed on the December IFA Census and fieldwork was conducted during 6<sup>th</sup> – 16<sup>th</sup> December, 2005.
- **293** AIFA members responded to the survey
- **163** were members of IFA networks
- These questions are being repeated in January 2006 wave.



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## Preparing and attendance of workshops / seminars / conferences

Practically all network members say that their network arranges workshops / seminars / conferences



Base – Dec 2005; All respondents who are members of AR networks and Service Companies (163)  
Does your network arrange workshops / seminars / conferences?



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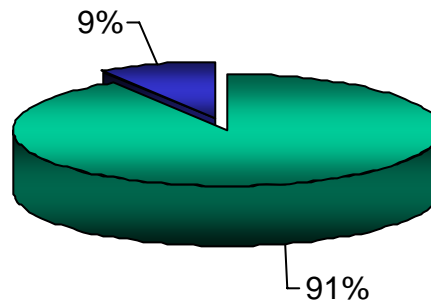


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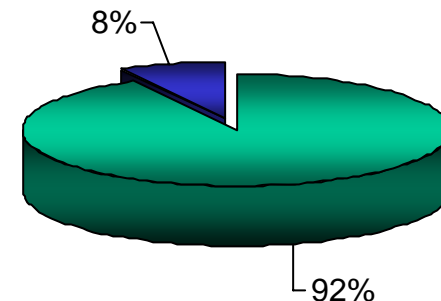
## Proportion of respondents attending events organised by networks versus product providers

9 out of 10 respondents attend these events, a similar proportion as those attending events organised by product providers

Proportion of respondents attending events organised by networks



Proportion of respondents attending events organised by product providers



Base – All respondents whose networks arrange workshops /seminars/conferences (159)/All respondents who are members of AIFA (293) - Dec 2005

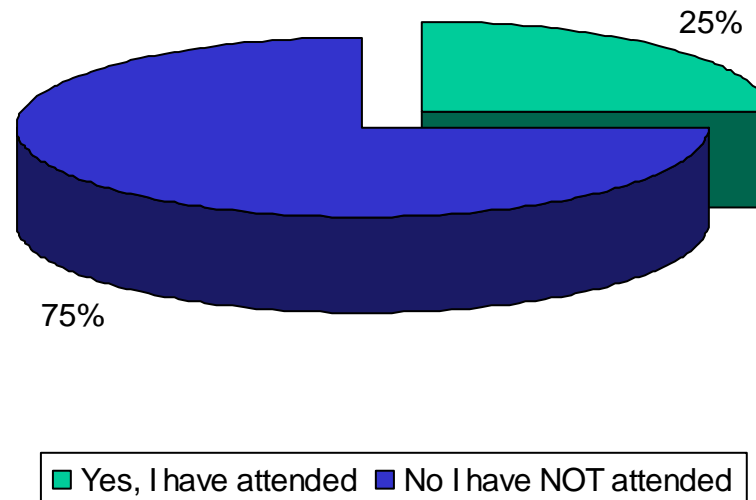
Do you attend any of the workshops / seminars / conferences arranged by your network? / Do you attend workshops / seminars organised by product providers?



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## Proportion of respondents attending AIFA events

In the last 2 years, three quarters of AIFA members surveyed have NOT attended an AIFA conference or dinner.



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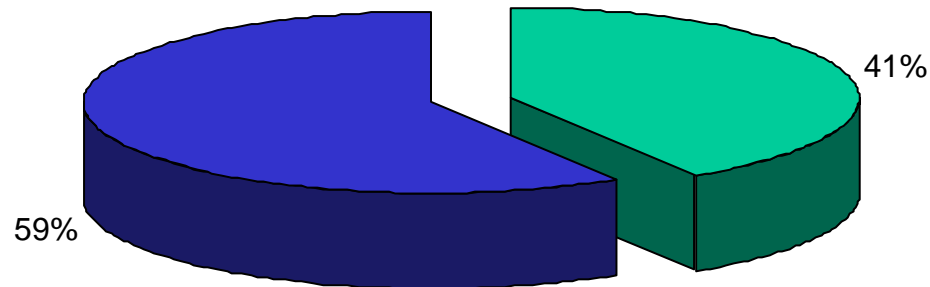
Base – Dec 2005; All respondents who are members of AIFA (293)  
Have you attended any AIFA conferences or regional dinners in the last two years?



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## Importance of AIFA events

Just over half of respondents do NOT find AIFA events important to them.



- Yes, AIFA events are important to me
- No, AIFA events are NOT important to me



Base – Dec 2005; All respondents who are members of AIFA (293)  
 Are AIFA events important to you?

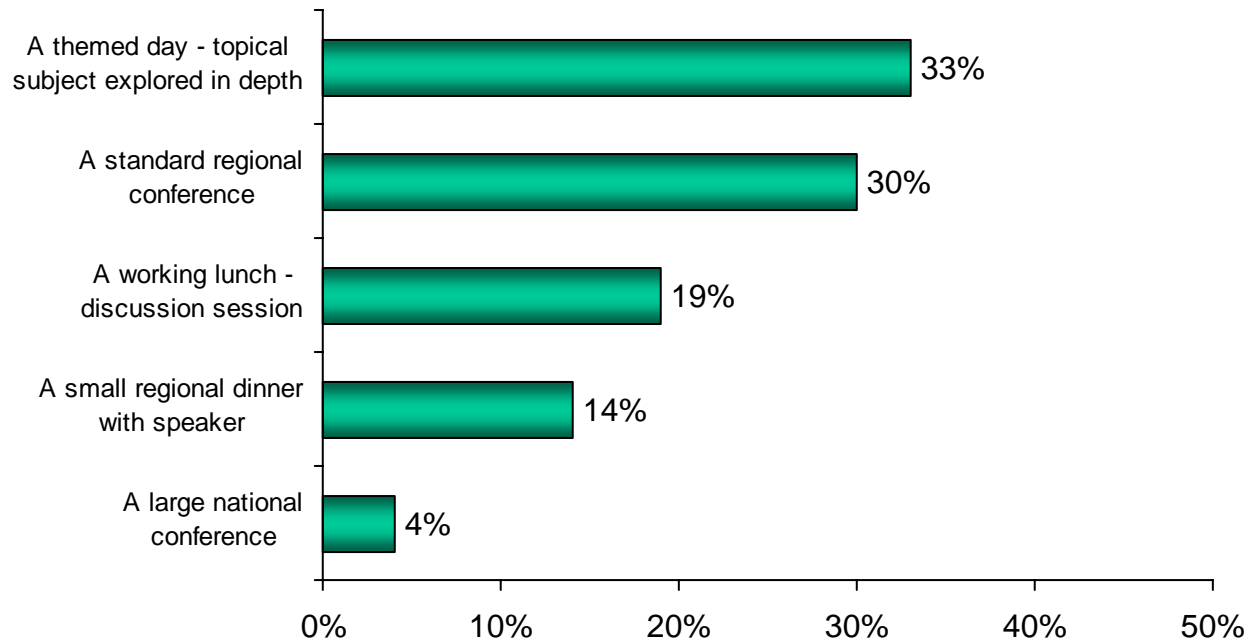


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## Preferred AIFA events in the future

Themed events are most preferred AIFA future events closely followed by standard style regional conferences. Large national conferences are not favored



Base – Dec 2005; All respondents who are members of AIFA (293)  
In the future, what type of AIFA event would you prefer to attend?

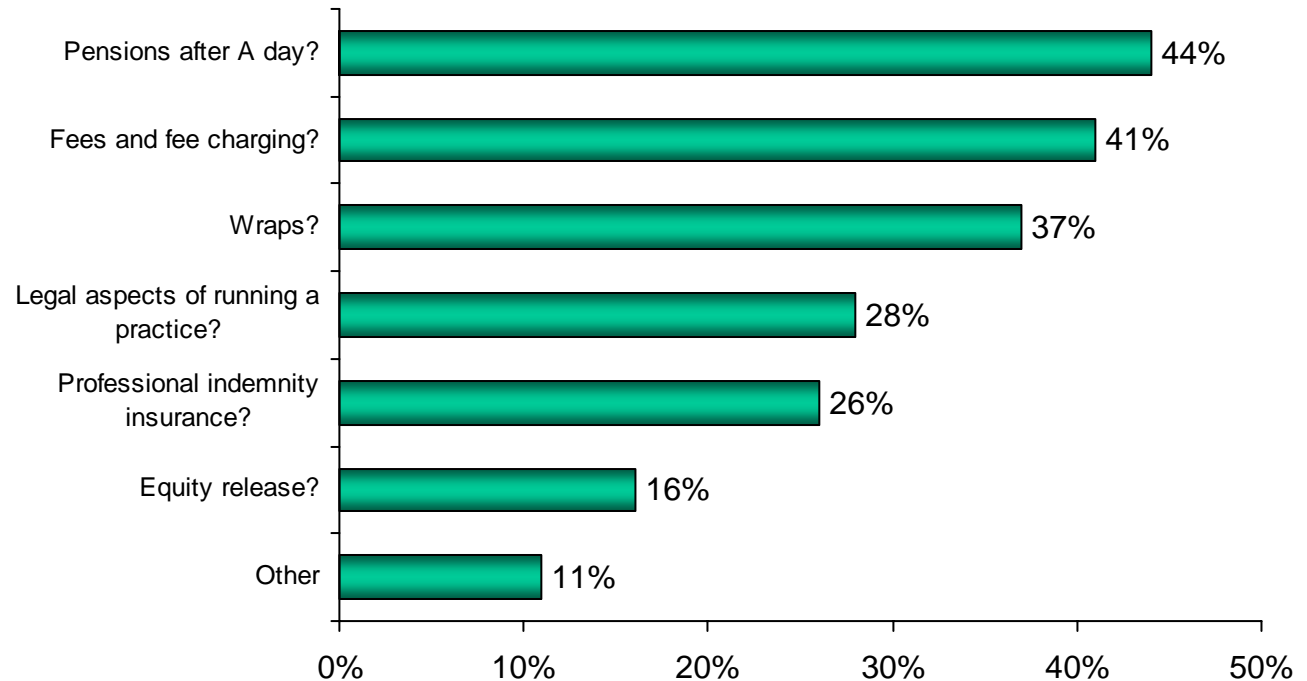


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## Interesting event topics

Just under half of AIFA members are interested in “Pensions after A Day”; “Fees and Fee Charging” is also a topic of interest



Base – Dec 2005; All respondents who are members of AIFA (293)  
Would you be interested in finding out more about: (tick all that apply)



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## Comments on improvements to AIFA events

More relevant to the IFA - e.g.  
Compliance issues & Product issues  
with professional speaker /  
presenters

Exchange knowledge and practices at a  
local level - concentrate on Mutual offices  
and Friendly Societies for with profits.

Extend invitation to senior support staff

By keeping them small and local - two  
speakers in the evening is good - Bank of  
England were great -

Become more focused on the end client  
and less on the provider proposition

Bankhall have recently arranged block  
membership with AIFA. It would be good to see  
some joint involvement with Bankhall as part of  
the existing seminar / training schedules

Learn about Wraps that are unfettered -  
including shares and investment trusts

Can't comment as haven't attended any. I DO  
appreciate AIFA's representative work and  
their valuable email communications.

Offer advisers the chance of some input on  
what would be more beneficial to their business  
because no two IFA practices are run the same.

More publicity / advertising to raise awareness  
of AIFA and the events that they run



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## Comments on improvements to AIFA events

Keep Mortgages separate from  
Financial Services

Meetings to take place at a more  
convenient location and for a longer time.

My main issue is that I prefer smaller  
events, but for some reason there is  
always 2-3 IFAs who want to dominate  
proceedings with a big ME ME attitude and  
this frustrates and annoys me to a point of  
not wishing to attend most congregations  
of IFAs.

Make them available locally no more than  
one date as it is not always possible to  
make a specific date. If the same agenda  
were available on two separate dates it  
would double the likelihood of being able  
to attend.

Events are not the reason for AIFA. I desire the  
body to represent us fairly and, if there matters  
where I believe they need to do so, I speak to  
someone about it.

Hold them more frequently at more convenient  
locations.

Make them more regional - we can't all easily  
get to London

Send out a circular to members, and have a  
'menu' of sessions and pick your sessions

Just keep on advising us of events that are  
relevant to our job.

By making them smaller affairs closer  
to home.





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## Contact

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