



FEIFA

The Federation of European Independent Financial Advisers

Benefits for UK advisers and advisory firms

HISTORY



FEIFA is a trade association that represents English-speaking advisers operating throughout Europe. This includes firms located and operating solely on the Continent and, increasingly, individual UK-based advisers with clients based there, or with assets abroad.

Whilst FEIFA exists to assist such businesses and individuals, it also aims to increase professional and technical standards of advice, for the ultimate benefit of consumers.

Founded in May 2009, the Federation officially launched in August of that year and provides a strong voice for the adviser community across Europe and beyond; representing the sector with financial institutions and, where relevant, with governments and regulatory bodies. FEIFA represents companies operating in over 30 European countries and beyond.

STRUCTURE

FEIFA is a non-profit trade association, operating on a constitutional basis. The Federation has an elected Executive Committee and is funded by the annual fees of Members and Partner Companies.

AIMS AND OBJECTIVES

- The Federation's main aims are to uphold and raise standards of professionalism and to enhance the quality of advice provided; this includes assisting UK advisers to create more positive and appropriate outcomes for their expat clients.
- We provide highly tangible benefits to our UK members, including assistance in areas such as compliance and regulatory requirements, training and recruitment.
- We help to maintain the widest product and provider availability for our membership thus safeguarding appropriate advice and future business continuity for members.
- Our membership criteria and vetting provide assistance to consumers, offering a level of comfort and peace of mind in any dealings with FEIFA members.

The Federation is not available to all advisers or advisory companies. We only admit members following a relevant vetting and due diligence process. FEIFA thus provides consumers with an independent assessment of the regulatory status of its members.

MEMBERSHIP BENEFITS



Regulatory Guidance

- Many UK advisers are inadvertently operating in an inappropriate manner with regards to expat clients, without the necessary regulatory status and/or the requisite knowledge. We can help.
- Brexit has made advising expat clients across Europe even more fraught with danger; we can help you to assist those clients and mitigate your risks.
- FEIFA's knowledge and experience can assist you in avoiding regulatory breaches, not least with regards to potential cross-border issues.
- Our regular **EU Regulatory Updates** filter the huge amount of European Regulations, Directives and Legislation into "bite-sized pieces", focused on the elements of relevance and importance to you.
- We input, directly or indirectly, to all EU consultations, and lobby on your behalf where relevant, to ensure that the regulatory framework remains workable and appropriate
- The Federation also keeps members informed with regards to relevant international developments in the regulatory environment.

Focused Training & Educational Support

- Our annual Conference provides complimentary attendance for all of our members; this is an event with a specific focus on successfully advising expat clients.
- Regular Masterclass Seminars and webinars provide further professional development benefits.
- Our monthly members' e-magazine provides technical and product information to further assist you in advising expat clients in the most appropriate way.
- Ad-hoc guidance and knowledge is available with regards to local/national tax systems across the EU and relevant, compliant products.

Compliance Knowledge

- Products readily available in the UK may not be compliant or even legally registered in other European countries. We can provide information and direction with regards to relevant and suitable solutions.
- Not only can this ensure that our UK members avoid using inappropriate or illegal products, it can also help to safeguard them from providing tax-inefficient advice.
- We can also assist with regards to QROPS (Qualified Recognised Overseas Pension Schemes) and expat pension options in general.

Access to Specialist Expertise

- We are often able to help our members to access unique or niche products and services, ensuring that our UK-based advisers are best placed to assist their expat clients.
- We have knowledge of, and relationships with, specialists in the areas of international mortgages and finance, global legal issues, and general insurance policies for expats.
- Our awareness of relevant banking facilities for expats can be highly advantageous to our UK members.
- In conjunction with legal specialists, we can help our UK adviser members assist their clients who have property issues, almost anywhere in the world.
- Increasingly we assist our UK advisers to find and communicate with relevant professionals in the European countries in which their clients now live or hold assets, and sometimes even further afield.

MEMBERSHIP BENEFITS (continued)



Retaining Client's Privacy

- Our in-depth knowledge of the CRS (Common Reporting Standards) – otherwise known as Auto-Exchange of Information – helps our members to advise their clients accordingly, understanding when and what data is exchanged and what legal means still remain, to retain confidentiality.

Product Development

- We work closely with a number of major international life offices and asset managers, making sure that a wide range of products are available in the European expat market.
- On occasions, specific products and services have been developed for the exclusive benefit of FEIFA members and their expat clients.

Professional Indemnity Insurance

- Various PI knowledge and guidance is available for FEIFA members, specifically catering for the needs of advisers with clients in other countries.

Image Benefits

- Membership of FEIFA increasingly acts as a professional “kitemark” in the British expat markets across Europe.
- Being a FEIFA member shows that a UK adviser is dedicated to having the full range of information, knowledge and product access needed to professionally advise expatriates.

Lead Generation

- The FEIFA website generates regular consumer enquiries, which are only forwarded to FEIFA members.
- Coverage on various relevant websites and our significant media profile (*International Adviser*, *International Investment*, *Professional Adviser*, etc) assists our members to raise their own profiles in expat environments.
- This makes FEIFA members the natural choice for expatriates and emigrating Brits.

The Power of a Single Voice

- FEIFA helps to coordinate information and action with regards to industry issues such as gated or suspended funds.
- Legal action can and is synchronised as and where relevant.

Our Annual Conference is entirely complimentary for FEIFA members. This industry-leading event is unique in that it is predominantly designed around the requirements of the delegates, our members. The format, structure and location are all selected as a result of the valuable feedback that we receive from our membership therefore providing significant benefits for them.

Professional Development

An excellent range of high quality speakers and companies have always presented. The structure and schedule provide a very diverse day, with significant professional development and training benefits for attendees. Each delegate is eligible for a CPD Certificate, issued by FEIFA, confirming the amount of hours of training received.

Format and Schedule

The day provides presentations, keynote speakers, business leaders and an interactive panel session. The event is split into four, with each session followed by scheduled networking breaks to keep the day interesting and focused.

There are refreshments available at registration and also during coffee breaks in both mid-morning and afternoon. In addition a full lunch is also provided. All drinks and food are complimentary for delegates.

Exhibition Hall & Networking Benefits

There is a large exhibition area where delegates are able to network and mingle, as well as obtain further information during the various scheduled breaks. Attendees find that, in addition to the presentations, the benefits of meeting and networking with fellow professionals based across Europe, and with a range of providers and industry experts, proves to be highly advantageous.

Accommodation

Complimentary accommodation at the venue hotel is provided by FEIFA to delegates for the preceding evening, allowing attendees to have an unhurried trip in and enjoy the pre-Conference drinks reception.

Venue

In recent years the event has been held at the excellent Hilton Tower Bridge Hotel. The four-star, deluxe Hilton is situated within a leisurely five minute walk of London Bridge train and underground stations, the former being accessible by train from Gatwick in only 30 minutes. It is also easily accessible from all other main London airports.

The hotel is also located close to the Thames, as well as iconic tourist attractions such as Tower Bridge, The Shard and the Tower of London. In addition, the heart of the City is just a short walk across London Bridge. The hotel was selected for this convenient location and also due to its excellent business meeting space. The Conference facilities are very high quality and all in close proximity. There is complimentary high-speed wireless internet access throughout for delegates. The hotel also has stylish, elegantly furnished guest rooms.

Drinks receptions

A complimentary pre-Conference drinks reception is held on the preceding evening. In addition, following the presentations and exhibitions on the day, there is also a post-event drinks reception; once again this is complimentary for attendees and allows further networking, plus assessment of ideas from the day.

The feedback from every previous FEIFA Annual Conference has been exceptionally good, with delegates rating the content and organisation very highly. It is why most of them attend each year.



Whilst CEO of the Personal Finance Society, Keith Richards addressed our Conference delegates.

UK MEMBERSHIP FEES



Membership of FEIFA for UK advisers is available on an individual basis, thus catering for the specific needs of professional advisers with international clients. Fees are as follows:

- **Application Fee:** at present, FEIFA is waiving this fee for all UK-based, FCA-regulated advisers.
- **Annual Membership Fee:** this is an incredibly modest £70 per annum, per adviser. Payment is on an annual basis.

PARTNERSHIP PROGRAMME

FEIFA has embarked on a wide range of successful affiliations with numerous companies since launching its Partnership Programme in March 2010.

Our Partner Companies assist our members by providing frequent and relevant product, legislative and technical information and/or developing unique products, services or arrangements - as well as, in many cases, working with us to deliver training and professional development benefits.

Partner companies include:

- Major international life assurance companies
- Global investment houses
- International pension providers
- Trust companies
- Mortgage specialists
- Legal experts
- Media companies
- Insurance facilities
- Recruitment specialists
- Research companies

For further information contact FEIFA:
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