



### Working group member: Supporting Financial Literacy Charities

No of new member volunteers	6
Timeframe	1 October 2018 to 30 June 2019
Commitment	40 hours
Reports to:	Will Goodhart, CEO

#### Purpose

There is a growing awareness that the poor level of financial literacy across the general population in the UK is leading to unnecessary economic hardship for a high proportion of the population and with an ageing population, this could become a ticking pensions timebomb. Many charities are now focussed on financial education, particularly for young people and this seems like the perfect area where CFA UK members could volunteer their expertise.

Following the recommendations from our Value of the Investment Profession (VOIP) research, CFA UK would like to improve the access financial education charities have to CFA UK members and their expertise.

The group should aim to deliver a programme across the 2018-2019 membership year to best help financial literacy charities.

#### Main activities:

- Develop and implement the strategic direction and operational plans to support this initiative in line with VOIP recommendations.
- Explore and build partnerships with organisations involved in financial education.
- Assess the most effective way of supporting these charities by identifying key needs/gaps that could be supported by CFA UK members
- Devise events and education for CFA members to engage with the charities

#### Who are we looking for?

- Members with experience of and/or interest in financial education
- Those keen to promote pro bono volunteering opportunities
- Individuals with good communication and PR skills
- **We are keen to identify a volunteer lead to guide this group. If you are interested in leading, please state this on your application form.**
- Availability for around six meetings throughout the membership year plus conference calls and work to move ideas forward between meetings
- Ability to work with a group to shape ideas.
- Interest in leading/hosting one related event.

#### What you will gain:

- Build your profile within the CFA UK network of volunteers, the wider membership and the industry
- Develop leadership, communication and team work skills



- Recognition for your contribution in shaping and delivering external charity volunteering services to the membership
- Opportunity to meet and network with other like-minded investment professionals
- Volunteering brings a “shared experience” amongst peers that has long lasting benefits for your career

If you are interested in applying for this opportunity, please download the Volunteer Application form and return it along with a copy of your CV to [volunteer@cfauk.org](mailto:volunteer@cfauk.org)

**Deadline for applications:** 7<sup>th</sup> October 2018