



MY PERSONAL FINANCE SKILLS



My Personal Finance Skills – Personal Finance Society *pro bono* VOLUNTARY MEMBER ROLE

I am pleased to confirm your appointment as an Education Champion for the Personal Finance Society ("PFS"). Our expectations and a description of your role is attached at **Schedule 1**.

1. Appointment

Your appointment will commence on the date you sign this document.

2. Duties

Your role and duties are those as outlined in **Schedule 1**.

3. Benefits

You will be entitled to use the title 'PFS Education Champion' on your CV/professional profiles.

The PFS will assist the Education Champion by providing necessary materials for effective delivery of an event as well as informative collateral to assist this delivery. Where the PFS provide materials necessary for the delivery of an event, please endeavour to return these materials in the same condition they were given in as they will be used at another session.

The PFS will contact Education Champions when a school event is confirmed within their region. The PFS will also provide you with advice and guidance on how to approach and interact with schools of your choice should you wish to contact a local school. Where the event has been scheduled independently, please inform us at least 3 weeks prior to the session taking place.

4. Outside Interests

It is acceptable and acknowledged that you have business interests other than those of the PFS but please remember your role is also to represent the profession in its entirety. In the event that you become aware of any potential conflicts of interest, these should be disclosed to legal@cii.co.uk as soon as apparent.

5. Confidentiality

All information acquired during your voluntary role is confidential to the PFS and should not be released, either during your time as an Education Champion or following termination (by whatever means) to third parties without prior clearance from the PFS.

6. Data Protection

- 6.1 The parties agree to comply with their obligations under applicable data protection legislation, including, as applicable, the Data Protection Act 1998 and General Data Protection Regulation ("GDPR") (or its equivalent implementing legislation). Any data protection terms in this clause 7 shall have the meaning ascribed to them by the GDPR.
- 6.2 The parties agree that the processing operations under the Agreement conform to the description set out in Schedule 2.
- 6.3 If you process or receive or otherwise have access to our personal data, we are the data controller and you are the data processor.
- 6.4 You agree that you shall:
- 6.4.1 implement and maintain appropriate technical and organisational measures to meet the requirements of applicable data protection legislation; and
 - 6.4.2 comply with your obligations and the requirements set out under Article 28(3) of the GDPR.

7. Code of Ethics

By signing this Agreement, you agree to be bound by the CII's Code of Ethics, details of which can be found by visiting our website: www.cii.co.uk

8. Expenses

The costs incurred for any resources used for sessions will be covered by the Personal Finance Society. However, travel and time will not be included.

I would be grateful if you would sign this document as confirmation of your acceptance of these terms and return an electronic copy via email to volunteer@cii.co.uk

I look forward to you being part of this journey as we help to provide well needed financial education to future generations!

Yours sincerely,

George Tsounias
Relationship Manager - Education

I, _____, accept the terms set in the Letter of appointment for the role of an Education Champion.

Signature: _____

Date: _____

Services

Brief description outlining the purpose of the role

To provide elements of financial education through the My Personal Finance Skills programme to students between the ages of 15-18 (year 10-13). This programme also includes sessions that talk about the career opportunities in the profession. Materials and documents have been created to support Education Champions with successful delivery of sessions.

While there is an element of flexibility in delivery, we expect Education Champions to follow the PFS guidelines on the use of the resources for sessions. All student feedback forms should be returned to the PFS and completed anonymously (as stated on the forms). Any feedback forms that include personal student details should be disposed of at the school.

SCHEDULE 2

Processing of personal data

Description of processing activities.

1. Subject matter

Collecting session feedback forms on behalf of the PFS.

2. Duration of the processing

For the duration of this Agreement.

3. Nature and purpose of the processing

To enable the PFS to evaluate feedback and assess impact of sessions delivered by an Education Champions.

4. Categories of data subjects

Students who take part in My Personal Finance Skills sessions delivered by an Education Champion.



George Tsounias
Relationship Manager - Education
Chartered Insurance Institute
Personal Finance Society
1st Floor, 21 Lombard Street, London, EC3V 9AH
T: +44(0)20 7417 4774 M: 07920 244 515
W: cii.co.uk
Standards. Professionalism. Trust