

Summer to remember

CIM FINANCE GROUP SUMMER RECEPTION AND AGM

After a damp, forgettable summer, The Finance Group did its best to make up for it. Their second annual late summer reception took place on 27 September, and it was an evening to remember.

This year, it was set in the unique setting of the Piazza right alongside London Wall at the luxurious Grange City Hotel. Equipped with barbecue, al fresco dining, private bar, marquee, and the London Wall as the back drop, guests were wowed by the location. The evening was cool, but clear, and a beautiful moon rose over The City of London.

"The event, which started at 6pm with a Champagne reception, is designed to enable those interested in the marketing of financial products the chance to meet fellow marketers from various sectors in the Finance Industry while enjoying superb speakers, great food and light entertainment," said organiser Kathy Lewis, Chair of the Finance Group.

A celebration of our first year's success and review of forthcoming initiatives commenced the proceedings. This was followed by a quick summary of our nominated Charity, the CIM Benevolent fund who supports marketers who fall on difficult times.

Michael Warne, The Regional Director for CIM South East, made an emotional appeal for members attending the event to support their fellow marketers through the evening's raffle. Prizes included a English Board Cricket bat signed by all the current English cricket



Picture supplied courtesy of the Grange City Hotel

team players (worth up to £10,000 in auction) donated by the English Cricket Board, a limited edition print of 20th Century artists and a hand made box of chocolates, both donated by WTS Land.

Expert industry speakers included Jim Cunningham, Senior Economist at the Mortgages and Lending Council, speaking on the US mortgage and sub-prime lending market affecting the global and UK economy, and Doug Taylor, Finance Campaign Leader, *Which?* Magazine and the FSA regulatory advisory committee.

Jim Cunningham did his best to allay fears as he explained the sub prime and prime lending market in some depth, while Doug Taylor put forward somewhat controversial views about who was to blame for consumers' dissatisfaction with the banking industry.

"We wanted very topical speakers for our annual summer meeting and with the current situation affecting banks such as Northern Rock and implications on consumer credit and lending," said Kathy Lewis. "Jim Cunningham, an expert on the market situation was a perfect choice to update our members on the market situation and its implications. This was followed by Doug Taylor who gave us his impressions of what the banking industry could do and how they should do better for their customers."

James Fox, ex-Fame Academy finalist and Eurovision Song contestant finished the evening with a variety of popular songs. James was clearly a favourite with the members, with each song

receiving a round of applause. James has enjoyed international success after appearing on our screens, having been chosen from worldwide applicants to recently appear as Billy Joel on Broadway, and has played for the British Troops in Bosnia, the Falklands, Afghanistan and Iraq. He has also sung twice for the Queen and has a top 10 hit with 'Hold on to our love'.

Following the night's success, the Finance Group is already being urged to book the venue again for next year. Feedback from attendees has been extremely positive, with many expressing they "liked the topicality of the speeches and the venue was a real wow." Others commented on the fun relaxed atmosphere which gave them the opportunity to really enjoy what is clearly the last of the summer evenings. "Thanks for the evening you organised on Thursdaywe had fun!" "I thought it was a lovely evening, and after the first couple of glasses the cold just disappeared".

Those attending the summer BBQ and champagne reception also received a complimentary caricature by David Lewis, caricaturist for ITV's award winning 2DTV, Wogan, Jack Dee, Beano, The Sunday Times and The Economist. He delighted attendees with their illustration within just three minutes, providing each with a memoir from the event.

Many thanks to Grange Hotels for supporting the event and also The English Cricket Board and TWS Land for their kind donations for the raffle.



James Fox, ex-Fame Academy finalist and Eurovision Song contestant

Tessa throws out a challenge at CIM's CSR lunch

Tessa Sanderson challenged business leaders to seize the opportunities presented by the 2012 Olympics in London to regenerate deprived youngsters as well as the local infrastructure.



She made the comments at the first ever CIM Corporate Social Responsibility Lunch on 19 April for the Newham Sports Academy, one of the Finance Group's four nominated charities. The Finance Group raised more than £5,000 at the event.

Around a hundred people attended the event in Newham, the host borough for the 2012 Games. They were greeted with a champagne reception, sponsored by Orion, and by the Major of Newham, Sir Robin Wales and member of the London Organising Committee for the Olympic Games. Olympic and sporting personalities also played host.

Tessa Sanderson, CBE, the main host speaker at the lunch, was preceded by a warm welcome from the Major of Newham, Sir Robin Wales, and followed by John Inverdale, BBC Sports presenter who hosted a charity auction to raise funds. Items up for grabs included a signed boxing glove by guest Colin McMillian, dinner for two, a case of fine wine and an original England Cricket Team shirt.

Speaking on behalf of the Newham Sports Academy since the event, Tessa Sanderson thanked the Finance Group for their kind donations and interest she received from members in the finance industry and market interest group. "The Newham Sports Academy would like to thank you very much for your kind generosity. We look forward to sharing with you our potential Olympic Gold medal winner's success in the near future."

During the lunch Tessa talked at length regarding the plight of those with talent in the poor areas of Newham and how the Newham Sports Academy

enables those with less opportunity to improve their existing lifestyles. Tessa explained that the Academy was established to fulfil a niche in the sporting arena. "Since my retirement I have learnt there is still a huge gap between the grass roots and elite level in sport for those who needed help and the opportunity especially in the deprived areas."

The aim of the Newham Sports Academy, which Tessa launched in October 2006, is to give young people in Newham a sporting chance in life. "We are trying to give young, talented people who live in Newham the opportunity to aspire themselves and inspire others to fulfil their potential not just as sportsman but also certain goals they have by getting specialised coaching through training and creating a pathway for them to fulfil their education, and the main goal is to find and tap into that untapped talent to make the 2012 Games.

"Talent alone isn't enough. The opportunities need to be created. The Newham Sport Academy will take raw talent and push it to win. Athletes at grass roots level get so little funding and help compared to the elite. I try to bridge that gap."

Tessa added: "The Games are coming here to help regenerate the whole of the area, to create opportunities to help local people: I think they will do just that."

"We already see new business coming here, and young people call in all the time looking for information on new jobs and affordable housing - that is all now available."

During her talk Tessa mentioned how

big businesses can be more responsible. "The City and Docklands, where they make billions of pounds everyday is right on our doorstep. The aim of Corporate Social Responsibility is to improve the lives of people in deprived communities and socially excluded groups who experience poor quality of life, poor environmental quality and limited access to services/education/healthcare and transport, particularly in the neighbouring community where the business is situated.

"The Academy costs £250K to run, and looks after over 30 potential Olympic gold medal winners. Money is spent on equipment, elite coaching, health care and travel costs. So far sponsorship has come from Tate and Lyall, and partnerships with the University of East London and the Primary Health Care Trust." But the Academy needs support from others to succeed and local businesses can become friends of the Academy and support by pledging partial funding.

Tessa believes the legacy for the 2012 Games for Newham could be astounding. "I want the legacy of the games to be that the whole area gets regenerated. We also want the sporting facilities that are going to be left utilised 100 per cent beyond 2012, creating pathways for youngsters to use to better themselves. My vision is this will come together and we will see a strong generation of people coming out of Newham after 2012."

To help regenerate our host borough and the potential gold medal winners, contact Tessa Sanderson on tessa.sanderson@newham.gov.uk.

A new Dawn

Having helped with the launch and set up of the Finance Group, Trish Roberts has stepped down as the Group's Secretary.

Taking over the reigns is Dawn Wills, a Chartered Marketer who has 17 years of experience in marketing. Dawn has been working with CIM Greater London Region for almost two years and has her roots in the banking sector.

She began working with the CIM Finance Group in July and is involved with event organisation and promotion, projects and secretarial support to the committee. "I am looking forward to the range of tasks involved and meeting members at our various events," says Dawn.



New Student Representative

Also new to the committee is Tania Swasbrook, who joins as the first Student Representative. Tania has six years experience in marketing and currently works for the Royal Bank of Scotland. She is currently completing her Masters in Marketing Management (University of Westminster), having already done a certificate in Marketing (New York University) and a BA in International Relations (Hons) from the University of San Diego.

Tania has strong views relating to studying and will be an insightful and valuable member on the committee. She can be contacted to discuss study member's issues on tania.swasbrook@cimfinancegroup.co.uk



Golf tournament suits finance group to a tee

Given that Scotland gave the world golf, it was appropriate that a team from the Royal Bank of Scotland won this year's CIM Finance Group Golf Tournament – with the best team score.

And there were plenty of other winners too. The tournament was held on the 4 June at Stoke Park in Buckinghamshire, voted the golf course of the year (2006) by the Observer Sport Monthly.

Other winners included Simon Huggins, Managing Partner at Huggins & Lewis Foskett for the closest to the pin, and Patrick Phelan, Director at Barcon Financial Technology for the longest drive.

Speaking on behalf of RBS, Richard Green, Director of Strategic Marketing at Major Corporate Banking said "We are absolutely delighted at becoming the winning team for the CIM Finance Group Golf Tournament.

"We loved the day out and in particular being able to spend time with Kiran Matharu who gave us superb tips on our technique throughout the day."

Kiran Matharu, is the youngest ever lady in the European tour. Kiran is not only driving women's professional golf forward at a rapid pace in the UK, but also internationally where she is a big hit in Asian Golf. A former English Amateur Champion, and the Sony Entertainment Asia Female Junior Sports Personality for two years running (2005, 2006), Kiran is also the first Golfer ever to be a Prince's Trust Sporting Ambassador.



4Sports, our sporting partner, organised the Golf day and manages Kiran Matharu among other professionals, including Justin Rose. Marcus Day, the Director of the Golf Division, said "I believe there's real potential to make the CIM Golf day an annual event."

Kathy Lewis, the Chair of the Finance Group was thrilled that everyone at this event really enjoyed themselves. "I have never heard such positive feedback on any event as much as this one from all of those who came and enjoyed themselves. Everyone was asking about booking up in advance for next year. So let's hope that we can find a sponsor and persuade Justin Rose to join us as well."

If you are interested in sponsorship opportunity for this event or any other, please contact Deepa Patel on deepa.patel@cimfinancegroup.co.uk.

Finance Group is in the House

A high-profile parliamentary reception will be held at the House of Commons on the 5 February 2008 at 7pm. Hosted by Paul Goodman MP, Shadow Junior Community and Local Government Minister.

This CIM Finance Group flagship event is aimed at raising the profile of marketers in the finance industry. Traditionally marketers are not represented on the board of many financial institutions. The Finance Group hopes to help change this by highlighting marketing excellence at the top and in the UK's most powerful decision-making venue.

"It is about focusing on the valuable contribution which marketers make through research, selling and distribution of financial products not only to industry, but also to society and the wealth of the nation," said Garry Heath, CIM Finance Group's Parliamentary Envoy and reception

organiser. "Our parliamentary reception is designed to create awareness of our contribution and to raise the profile of our marketers within the industry.

"This year's reception will include some important comments on savings and pensions. With over 100 guests and VIP's, members can not afford to miss this once a year opportunity to network."

The reception will be held in the Terrace Pavilion overlooking the Thames, with refreshments provided. Marketers are urged to book early as places are already filling fast.

Email Garry Heath at garry@garryjheath.co.uk for more details.

WEBINAR: Beginners Guide to CSR

History was made on 23 August 2007 as CIM Finance Group launched a new style of events for CIM members – the webinar.

This exciting format lets delegates enjoy seminars via the internet, with technology enabling full interaction for questions and discussion. The first topic was 'A Beginners Guide to Corporate Social Responsibility', presented by Jolyon Ridgwell, Director at the Lighthouse Consultancy.

Jolyon's presentation was extremely informative and enlightening. He discussed the background to Corporate Social Responsibility' (CSR) before highlighting the importance and benefits of it to financial services organisations.

He then outlined trends via case studies before discussing ways that marketers can make a real impact in this area, remembering that a business-case, incorporating the risks and opportunities involved, must be compiled.

This new style of event creates a welcome opportunity for members, as location and travel need no longer bar participation; 25 members attended the first ever webinar and despite some technical difficulties experienced by some participants, feedback received was extremely favourable. Many took the time to write in, stating that they found the webinar to be "very interesting and informative".

Positive comments included: "I've just been on the CSR Webinar, I found it really informative and it has given me food for thought."

Contact Kathy Lewis on email kathy.lewis@cimfinancegroup.co.uk for registration and further information on forthcoming webinars.

STOP PRESS

Website now online

The Finance Group website has been launched. It offers marketers in the finance industry a dedicated site for continuous professional development opportunities, a mechanism to keep informed and up to date, and several other benefits.

"We are delighted that we can offer a greater range of benefits via the website to marketers working in finance and related products," said Dawn Wills, of the CIM Finance Group.

You can now:

- book your place at our high profile, CPD and networking events online, upto a year in advance;
- hear podcasts from high profile and celebrity speakers;
- update your knowledge bank with case studies and copies of speaker presentations;
- use our partner organisations for discounts on listed products and events;
- raise your company's profile through sponsorship opportunities listed on site or advertising on the website; and
- and even become an affiliated or a full member on line.

Simply click onto the website www.cimfinancegroup.co.uk and enjoy.

Finance Market Interest Group

Winter Events Programme (2007/08)

5 FEBRUARY 2008 – LONDON

Parliamentary Reception

VENUE: Terrace Pavilion, Houses of Parliament

HOSTED BY: Paul Goodman MP, Shadow Junior Communities and Local Government Minister

SPECIAL GUESTS/SPEAKERS: to be announced

TIME: 7.00 pm

COST: CIM/FDA Group members - £35.00;
non-members - £40.00
studying members - £30.00

INCLUDES: Finger buffet and beverages

CPD HOURS: 2 hrs (contact kathy.lewis@cimfinancegroup.co.uk for CPD certificate).

CONTACT: Dawn Wills for more information on email at dawn@decisions.ltd.uk

FEBRUARY/MARCH 2008 – LONDON

Evening Seminar – Treating your customer fairly.

VENUE: Grange City Hotel, 8 – 10 Coppers Road, London EC3N

SPEAKERS INCLUDE: Financial Services Authority

TIME: 6.00 pm registration for 6.30 pm start

COST: CIM/FDA Group members - £25.00;
non-members - £30.00;
studying members - £20.00

INCLUDES: Refreshments

CPD HOURS: 2 hrs (contact kathy.lewis@cimfinancegroup.co.uk for CPD certificate).

CONTACT: Dawn Wills for more information on email at dawn@decisions.ltd.uk

MARCH 2008 – LONDON

MASTERCLASS – Are sustainable investments a new marketing challenge?

This master class will include an explanatory presentation, along with two case study presentations.

VENUE: Grange City Hotel, 8 – 10 Coppers Road, London EC3N

TIME: 6.00 pm registration for 6.30 pm start

COST: CIM/FDA Group members - £25.00;
non-members - £30.00;
studying members - £20.00

INCLUDES: Refreshments

CPD HOURS: 2 hrs (contact kathy.lewis@cimfinancegroup.co.uk for CPD certificate).

CONTACT: Dawn Wills for more information on email at dawn@decisions.ltd.uk

INVITATIONS FROM OTHER ORGANISATIONS

13 & 14 NOVEMBER 2007 – BIRMINGHAM

Conference: Personal Finance Society National Conference

Run by Personal Finance Society

SPEAKERS INCLUDE: Simon Woodroffe of Dragon's Den Fame, James Cracknell, the Olympic Rowing Champion, Michael Tipper, the grand master of memory, Tom Whittaker the world-class mountaineer who had to reinvent his life when both his legs were shattered and Andy Lothian who will show you how to work more effectively with your team.

VENUE: International Conference Centre, Birmingham

TIME: 8.00 am registration, 9.30 am Start and 5.30 pm Close

COST: Joint CIM/PFS members only £258.70

CONTACT: Phone **0845 166 8415** or go to the website www.thepfs.org for more information.

19 NOVEMBER 2007 – LONDON

Workshop: Financial Innovation & New Structured Products in the Equity World

Run by Unicom

This workshop will survey the broad range of products now being traded and created in the market for equity investments.

SPEAKERS INCLUDE: Professor Dilip Madan, Robert H. Smith from the School of Business, University of Maryland/Consultant to Morgan Stanley

VENUE: Brunel University, West London, UK

COST: Academics & Researchers £105 + VAT,
Members from Industry £395 + VAT

DISCOUNT AVAILABLE: The CIM Finance group has organised a 10% discount for this event.
CIM Members = £355.50 + VAT.

CONTACT: Alec McCutcheon at alec@unicom.co.uk

FOR MORE INFORMATION:

http://www.unicom.co.uk/product_detail.asp?prdid=1557

The Finance Group is not responsible for any losses sustained through bookings with external organisations.

APPLY TO: Kathy Lewis, Chair Finance Group, 51 Forest Court, Snaresbrook, London E11 1PL

Tel: 07961 621 317 • email: kathy.lewis@cimfinancegroup.co.uk

Please reserve me place(s) at the event on

I enclose a cheque for made payable to CIM Holdings Ltd

Name: Company:

Address:

..... Post code:

Phone: Fax:

e-mail:

CIM member FDA Group member Neither Studying member

Special requirement eg dietary or disability (please state)