

# INTERNATIONAL ADVISER

## J.P. Morgan partners with FEIFA

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Added 04 January 2011 by Simon Danaher, Senior Online Reporter, Last Word Media

### **J.P. Morgan Asset Management (JPMAM) has partnered with the Federation of European Independent Financial Advisers.**

The partnership will give FEIFA members, of which there are now 340 adviser advising on in excess of €2bn, access to the J.P. Morgan Adviser Academy which runs events designed to help advisers evolve their business and grow assets under advice.

Full article at: <http://www.international-adviser.com/article/jp-morgan-partners-with-feifa>



## FEIFA- The Federation of European IFAs

FEIFA (the Federation of European Independent Financial Advisers) has seen very rapid growth in just 17 months since launch. The Federation is a unique trade association for English-speaking IFAs based or operating on the Continent. Whilst initially formed to predominantly assist companies based in mainland Europe, we have seen increasing interest in our services from IFAs in the UK.

Full article at: <http://advisercompass.co.uk/a/blogs/show/204>

# INTERNATIONAL ADVISER

## Incapital is latest FEIFA partner firm

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Added 03 February 2011 by Dan Judge

**Incapital Europe, a structured product provider, has been approved by the Federation of European IFAs (FEIFA) as a partner organisation.** The company is the European subsidiary of US investment bank Incapital, which describes itself as the “leading independent

Full article at: <http://www.international-adviser.com/article/incapital-is-latest-feifa-partner-firm>

# PORTFOLIO ADVISER

## IMD advisers warned not to advise on direct investments

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Added 11 February 2011 by Simon Danaher, Senior Online Reporter, Last Word Media

**Advisers operating in Europe under the Insurance Mediation Directive (IMD) must ensure they only give advice on investments if they are within an insurance wrapper.**

This is according to research conducted by the Federation of European Independent Financial Advisers, which looked at the regulatory authorisation required by IFAs advising on investments within an insurance wrapper in Europe.

Full article posted at: <http://www.portfolio-adviser.com/article/imd-advisers-warned-not-to-advise-on-direct-investments>

# MoneyMarketing

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## Passport control - 10 February 2011

A combination of recent events, plus extensions to EU financial directives and the onset of the RDR have highlighted the progressively greater importance of European aspects for UK IFAs. Last summer, the issue of passporting came to the fore following a suggestion by Aifa that UK-based IFAs should not rule out the option of passporting their businesses back into the UK from another EU state. Fresh developments have further highlighted the possibilities..

Full article at: <http://www.moneymarketing.co.uk/adviser-news/passport-control/1026023.article>



## The Importance of FEIFA to UK IFAs 13/02/11

FEIFA (the Federation of European IFAs) has seen very rapid growth in just 18 months since launch. The Federation is a unique trade association for English-speaking IFAs based or...

Full article at: <http://www.advisercompass.co.uk/a/blogs/show/215>

## New partnership for FEIFA, Standard Bank Offshore

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Added 15 February 2011 by Helen Burggraf

**The Federation of European Financial Advisers (FEIFA) has agreed a partnership arrangement with Standard Bank Offshore.**

It is the 37th company to agree such a deal with [FEIFA](#), according to Paul Stanfield, chief executive of the UK-based organisation, which represents European financial advisers.

Full article at: <http://www.international-adviser.com/article/new-partnership-for-feifa-standard-bank-offshore>

## FEIFA signals slow-down in partnership programme as HSBC AM joins

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Added 22 February 2011 by Dan Judge

**The Federation of European Independent Financial Advisers (FEIFA) expects to slow the pace of linking to new providers under its partnership programme because “most” member needs had now been met, according to its chief executive.**

CEO Paul Stanfield said after the addition of HSBC Global Asset Management this week – the 38th product or service provider to link to the organisation – it was likely “far fewer” new partners would join in future. “[The] Partnership Programme has exceeded our expectations and already met most of our members’ needs,” said Stanfield. “HSBC Global Asset Management, however, is ideally suited to add to those relationships and assist our member companies, particularly with regards to expertise in emerging markets.”

Full article at: <http://www.international-adviser.com/article/feifa-signals-slowdown-in-partnership-programme-as-hsbc-am-joins>

## FEIFA gains three more members

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Added 08 March 2011 by Simon Danaher, Senior Online Reporter, Last Word Media

**Three further firms have joined the Federation of European Independent Financial Advisers, bringing its total membership up to 20 companies.**

Full article at: <http://www.international-adviser.com/article/feifa-gains-three-more-members>

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## Trusting your IFA

It can be argued that the relationship between the financial adviser and the financially advised is as close as any family bond or life-long friendship. What takes place between such a pair can mean the difference between a life time of prosperity and security or the rest of a life spent in abject poverty and misery.

ExpatMoneyChannel's Hannah Beecham would like to suggest that the vital ingredient that must bind these two players together can be summed up in one word ... trust.

So to find out how an expat can be certain trust can be safely placed on the head and shoulders of an IFA - independent financial adviser - she asks expert Paul Stanfield, Chief Executive of The Federation of European Independent Financial Advisers (FEIFA), to describe what expats can do to ensure they only inhabit the drylands of adviser/client introductions and instructions and not the bog haunts of financial crooks and con merchants.

The full article and the interview is at:

<http://www.expatsradio.com/programmes/independent-financial-advisors>

### HSBC Global enters FEIFA programme

HSBC Global Asset Management has been admitted to the partnership programme of the Federation of European Independent Financial Advisers, the UK-based organisation has announced. Two other firms were also added in the past month: Standard Bank Offshore and Incapital Europe, a structured product provider. The additions bring the number of firms to have 'partnered' with FEIFA to 38.

## FEIFA responds to PRIPs, MiFID and IMD surveys

BY SIMON DANAHER

The Federation of European Independent Financial Advisers (FEIFA) has made submissions to the European Commission on the PRIPs initiative and the reviews of IMD and MiFID directives.

Responses to a consultation on Packaged Retail Investment Products (PRIPs), which aims to regularise the sale of investment products to the retail market, had to be submitted by the end of January, while submissions for the IMD and MiFID reviews had February deadlines.

It is widely expected

that the commission's review of IMD and MiFID will address overlaps and inconsistencies between the two regulatory regimes.

There has been increasing debate around the required regulation needed by advisers providing advice on direct and investment-linked insurance products over the past month. Last month, AES International's Sam Instone and FEIFA chief executive Paul Stanfield released conflicting research on the matter, sparking fresh debate.

The completion of the consultation periods of the initiatives is a welcome

step for IFAs seeking clarification on the issue.

The new PRIPs initiative will also help to clarify the authorisation required by IFAs to sell certain products. It is expected to define retail products that are sold in a 'packaged' format to the retail market, for example unit trusts and structured products.

Stanfield said it was important that FEIFA made the submissions, firstly in its obligation to lobby on behalf of its members, and secondly to ensure it remains at the "forefront of knowledge with regards to likely EU regulatory developments".

## **FEIFA partners with La Mondiale Europartner**

Added 23 March 2011 by Dan Judge

**The Federation of European Independent Financial Advisers (FEIFA) has struck a deal with La Mondiale Europartner, the Luxembourg-based cross-border insurance company.**

The company has joined FEIFA's "partnership programme" through which product providers receive greater access to the association's members, who in turn may be offered bespoke products or terms.

Full article at: <http://www.international-adviser.com/article/feifa-partners-with-la-mondiale-europartner>

## **FEIFA aids Cazenove Capital's European distribution**

Added 05 April 2011 by Dan Judge

**Cazenove Capital has joined the Federation of European IFAs (FEIFA) as a 'partner' member and highlighted the organisation's role in helping develop a strategy for accessing the offshore adviser marketplace.**

Paul Stanfield, FEIFA chief executive, said Cazenove was currently predominantly UK-focused in terms of distribution, but through its burgeoning relationship with FEIFA, this was changing.

"Similar to one or two recent partnerships, the alliance with Cazenove Capital will allow a highly respected asset manager, with a predominantly UK- focused distribution, to obtain cost-effective pan-European IFA distribution. This, in turn, brings benefits to our members who can now easily and effectively assess and potentially utilise a number of top performing funds."

Full article at: <http://www.international-adviser.com/article/feifa-aids-cazenove-capitals-european-distribution>

## **Ignore MiFID bluster**

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**There has been considerable discussion - if not much true debate - in recent months with regards to the scope of certain aspects of EU regulation and the implications of non-compliance. This is, of course, a very important subject, and one that has created significant misunderstandings in certain quarters.**

Full article at: <http://www.international-adviser.com/article/ignore-mifid-bluster-imd-is-what-you-need>

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## FEIFA members offered 40-year term assurance

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Added 12 April 2011 by Dan Judge

**The Federation of European IFAs (FEIFA) has struck a distribution deal with a protection provider offering term assurance policies of up to 40 years.** FEIFA said policies could be provided for adviser clients based in the majority of the world's countries, in a variety of currencies, with a maximum age of expiry of 75.

Full article at: <http://www.international-adviser.com/article/feifa-members-offered-40year-term-assurance>

## New wrap platform for offshore advisers

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Added 13 April 2011 by Dan Judge

**A new open architecture investment platform for international and offshore IFAs has been launched.** The Acordias platform provides a range of financial modelling and planning tools, as well as various investments structures, including funds, fixed term deposits, currency options and tax wrappers. The platform was unveiled in London on Monday at the annual conference of the Federation of European Independent Financial Advisers (FEIFA), whose members have exclusive use of it in Europe.

Full article at: <http://www.international-adviser.com/article/new-wrap-platform-for-offshore-advisers>

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## Members will see more business after deal with consumer website, says FEIFA

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Added 20 April 2011 by Dan Judge

**The Federation of European Independent Financial Advisers (FEIFA) has joined forces with a consumer financial website that it believes will lead to more business being generated for its members.**

“Our members will potentially receive enquiries, at no cost, from relevant UK clients, prospective expats and those already living abroad”, said Stanfield. The deal sees FEIFA become Total Investor’s “exclusive” European IFA partner. Under the terms of the agreement, any Europe-based IFA that wants to affiliate with Total Investor must first join FEIFA.

Full article at: <http://www.international-adviser.com/article/members-will-see-more-business-after-deal-with-consumer-website-says-feifa>

## Skandia International partners with FEIFA

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Added 28 April 2011 by Simon Danaher, Senior Online Reporter, Last Word Media

**The Federation of European Independent Financial Advisers (FEIFA) has partnered with Skandia International.**

Full article at: <http://www.international-adviser.com/article/skandia-intl-partners-with-feifa>

## Feifa offers members PI insurance deal

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Added 19 May 2011 by Dan Judge

**The Federation of European Independent Financial Advisers (Feifa) has created what it calls an “exclusive” professional indemnity insurance facility for its members.**

The service is provided in conjunction with ‘partner member’ company Capital Growth, plus underwriter Ace Europe Group. Feifa chief executive Paul Stanfield said the facility had been made available amid concerns that premiums offered by other insurers were rising to exorbitant levels.

Full article at: <http://www.international-adviser.com/article/feifa-offers-members-pi-insurance-deal>

## FEIFA posts 10% rise in membership

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Added 31 May 2011 by MaryRose Fison

**FEIFA, the European trade association for independent financial advisers, has grown its membership by 10% over the past few weeks.**

Professional Investment Consultants (PIC), Lighthouse Financial Services and Hollingsworth International all passed FEIFA’s due diligence, swelling the trade body’s membership to 25 IFA companies.

PIC is based Luxemburg and operates in nine European countries. Lighthouse is part of the Sovereign Group and although based in Spain, also has clients in Gibraltar, Portugal, the UK and Ireland. Hollingsworth International is active in Cyprus and Malta.

FEIFA was launched in August 2009 as a trade body for English-speaking IFAs based or operating on the European mainland. In the last few months, the organisation confirmed an alliance with Total Investor Website, providing potential clients and professional leads for members.

Posted at: <http://www.international-adviser.com/article/feifa-posts-10-rise-in-membership>



Stanfield: 'excessive rises'

## FEIFA offers insurance deal on professional indemnity

BY DANIEL JUDGE

The Federation of European Independent Financial Advisers (FEIFA) has created what it calls an "exclusive" professional indemnity insurance facility for its members.

The service is provided in conjunction with 'partner member' firm Capital Growth, plus underwriter Ace Europe Group.

FEIFA chief executive Paul Stanfield said the facility had been made available amid concerns that premiums offered by other insurers were rising to exorbitant levels.

"Many of our members have complained about either the increasing difficulty in obtaining such cover or excessive premium rises. We have therefore spent some time looking at a way to assist them in this regard," he said.

He said Ace has offices in all the countries in which FEIFA members operate and is able to issue policy documents in local languages as well as English.

A standard FEIFA member PII policy has been created, Stanfield, remarked, although he noted it can be adapted to meet individual member needs and local country regulation and laws.

Ace Group is AA-rated and issues its policies under the Lloyd's of London stamp, Stanfield added.

## FEIFA and IMG Europe sign enhanced commission deal

Added 13 July 2011 by Simon Danaher, Online News Editor, International Adviser



**FEIFA has agreed a deal with medical insurance specialist IMG Europe under which FEIFA members will receive higher levels of commission, with no extra premium payments for clients.**

The Federation of European Independent Financial Advisers said the deal with the insurer will mean its members will be able to offer short and long term cover for clients living anywhere in the world – except US nationals living in the USA – and for "virtually any nationality". This cover is available for individuals, families and corporate groups.

In addition to the increased commission, FEIFA said members will receive a priority allocation of online and "co-brandable" links for their website, as well as personalised quotation responses and one-on-one sales and marketing support. Furthermore, online, email and web-site marketing review, feedback and support are also available with co-branded training materials.

Full article at: <http://www.international-adviser.com/article/feifa-and-img-europe-sign-enhanced-commission-deal>

# Strength in numbers

**Paul Stanfield, chief executive of the Federation of European Independent Financial Advisers, discusses the trade association's success in bringing together English-speaking advisers operating on the Continent, and challenges its critics and naysayers**

BY MARYROSE FISON

Next month, the European trade association for English-speaking independent financial advisers (FEIFA) will celebrate its two-year anniversary. The date will represent a milestone in the organisation's development, from an all-but-unheard-of handful of internationally-focused

"There was a general feeling that there was a need for an entity to draw together what decent, regulated IFAs do in Europe, and act as a conduit between them and (investment product) providers," Stanfield says.

"We wanted to be able to act as a single voice, so that product consistency could be created and prod-

to take them in a different direction for their own benefit, rather than for what a trade body should be.

"So I was pleasantly surprised by the end of that day when I did not feel that I felt that all those people sitting around the table had got together for the right reasons, and they were the sort of people I could work alongside to

EU-compliant PII cover.

"In any EU company, professional indemnity insurance is a requirement for financial advisers, but it is not always that easy to obtain in certain countries," Stanfield notes.

"Sometimes there is little or no competition, and therefore premiums can be inappropriately high, so we wanted to bring a more

International Adviser Magazine, July 2011. Full article available on request.



## F&C Thames River one of latest three to join FEIFA

Added 27 July 2011 by Simon Danaher, Online News Editor, International Adviser

**F&C Thames River, Cheviot Asset Management and Alpha Real Capital have become the latest investment companies to affiliate with FEIFA under its partnership programme.**

The Federation of Independent Financial Advisers had soft closed its partnership programme earlier this year, but chief executive Paul Stanfield said these partnerships "are excellent examples of relevant additions to our existing alliances."

"F&C Thames River is a very well-known name of course, with a performance focused, absolute return orientated approach and some highly-rated managers like Ken Kinsey-Quick, Gary Potter and Robert Burdett managing a range of top-performing funds," said Stanfield.

"Cheviot, however, is entirely focused on providing discretionary management services, an area that our members had specifically highlighted as being of interest, and where we had only a small number of alliances presently in place."

FEIFA, a non-profit trade association for English-speaking IFAs, represents more than 300 advisers operating in 25 European countries and further afield, advising on estimated assets in excess of €2bn.

Article posted at: <http://www.international-adviser.com/article/fc-thames-river-one-of-latest-three-to-join-feifa>

# ifaonline.co.uk

## Federation of European IFAs on further growth spurt

Author: Deborah Benn International Investment | 02 Aug 2011 | 09:00

**The Federation of European IFAs (FEIFA) is looking to extend and revamp its recruitment service to include accessing experienced advisers from Asia and Australasia. At the same time, it is looking to undertake a similar exercise in the UK in the near future.**

FEIFA has also seen further growth in its Partnership Programme with three new alliances from F&C Thames River, Cheviot Asset Management and Alpha Real Capital.

Full article at: <http://www.ifaonline.co.uk/international-investment/news/2098530/federation-european-ifas-growth-spurt#ixzz1TsgZZYu4>

## INTERNATIONAL ADVISER

### Sovereign joins FEIFA alliance

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Added 03 August 2011 by Will Jackson, Editor, International Adviser

**Sovereign, an independent trust company, is the latest group to sign a partnership.**

Full article at: <http://www.international-adviser.com/article/sovereign-joins-feifa-alliance>

# ifaonline.co.uk

## FEIFA builds on global alliances

Author: Deborah Benn International Investment | 04 Aug 2011 | 08:00

**FEIFA (the Federation of European IFAs) has announced a partnership with the Sovereign Group, which is one of the largest independent trust companies in the world, with offices in over 25 countries.**

According to FEIFA's CEO, Paul Stanfield. "Sovereign offers experience acquired over 20 years in the field of trusteeship and pension services with the ability to service clients in their first language due to its network of offices."

Sovereign's core business is setting up and managing companies, pensions, trusts and other structures to meet the specific personal or business needs of clients. Typically these needs would include tax planning, wealth protection, foreign property ownership and facilitating cross-border business.

Full article at: <http://www.ifaonline.co.uk/international-investment/news/2099274/feifa-builds-global-alliances#ixzz1U4htaL2z>

## FEIFA partners with Judicare Group

Added 16 August 2011 by Simon Danaher, Online News Editor, International Adviser

**FEIFA has partnered with law firm Judicare Group, which specialises in assisting individuals with financial reclamations on overseas property.**

Full article at: <http://www.international-adviser.com/article/feifa-partners-with-judicare-group>

# ifaonline.co.uk

## FEIFA offers members overseas property legal help

Author: Rachel Dalton IFAonline | 16 Aug 2011 | 14:40

**The Federation of European IFAs (FEIFA) has joined forces with Judicare Group to offer advisers' clients legal advice on their [overseas properties](#).**

Full article at: <http://www.ifaonline.co.uk/ifaonline/news/2102185/feifa-offers-overseas-property-legal-help#ixzz1VCIA7D1f>



Exchange Traded Funds Magazine

## In brief: Feifa's Paul Stanfield talks to ETFM

Author: Alex MacAskill | ETFM | 23 Aug 2011 | 15:14

Article at: <http://www.ifaonline.co.uk/etfm/interview/2103800/brief-feifas-paul-stanfield-talks-etfm>



specialists in  
property investment recovery

23rd August 2011

## Unique legal services for FEIFA members

FEIFA (the Federation of European IFAs) has announced a new partnership that will provide unique legal services for its members.

Full article at: <http://www.judicaregroup.com/news/58-a-responsible-approach>



Exchange Traded Funds Magazine

## RDR unlikely to increase direct retail ETF use says Feifa head

Author: Clare Dickinson | ETFM | 05 Sep 2011 | 11:06

The Retail Distribution Review (RDR) will not change independent [financial](#) advisers'(IFAs) reluctance to use ETFs because they do not fully understand how they work, says the head of an industry body for advisers.

Full article at: <http://www.ifaonline.co.uk/etfm/news/2106571/rdr-unlikely-increase-direct-retail-etf-feifa-head#ixzz1XA326sSU>



## ATSG launches £100k 'quick cover' service

Added 12 September 2011 by Simon Danaher, Online News Editor, International Adviser

**ATSG Funds has launched a “quick cover” service, exclusively for FEIFA members, which will allow advisers to offer their clients £100,000 (or €100,000) life cover with no underwriting requirements.**

The product, which does not cover any pre-existing conditions and therefore needs no underwriting, is available to clients aged between 18 and 65, who reside in “included jurisdictions” and who do not partake in hazardous pursuits or have a hazardous job.

Full article at: <http://www.international-adviser.com/article/atsg-launches-100k-quick-cover-service>



## Regulation: A new risk (that's not so close to home)

Author: Paul Stanfield - Professional Adviser | 15 Sep 2011 | 08:00

**With emigration on the rise, more UK advisers than ever before have overseas clients. And Paul Stanfield, chief executive of FEIFA, has it on good authority that the FSA has taken note...**

Full article at: <http://www.ifaonline.co.uk/professional-adviser/opinion/2109225/regulation-risk-that-s-close-home#ixzz1YPRUMNPp>

## European trade body to partner with IFA Life

Author: Alasdair Pal - International Investment | 11 Oct 2011 | 15:13

The Federation of European IFAs (FEIFA), a non-profit [trade](#) association for English-speaking IFAs, has announced an exclusive partnership with social network IFA Life.

Full article at: <http://www.ifaonline.co.uk/international-investment/news/2116280/european-trade-body-partner-ifa-life#ixzz1clv4QzAp>



### Who fancies a European model?

By Paul Stanfield

Over the last decade or more we have all seen and often experienced the increasing impact of Europe on our lives. This has arguably been just as true in Financial Services, even though we may be less aware of the fact. For instance, the FSA admitted a little while ago that at least 70% of its regulations were now taken directly from EU Directives and rulings.....

Contact FEIFA for the whole article ([info@feifa.eu](mailto:info@feifa.eu)).

## INTERNATIONAL ADVISER

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### Jupiter offers discretionary management service to FEIFA members

Full article at: <http://www.international-adviser.com/news/europe/jupiter-offers-discretionary-management-service-to>

### Henderson follows Jupiter to join FEIFA

Full article at: <http://www.international-adviser.com/news/europe/henderson-follows-jupiter-to-join-feifa>

## FEIFA links with Aussie expat service

FROM EUROPE NOV 14 2011 BY: WILL JACKSON

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The Federation of European Independent Financial Advisers (FEIFA) has formed a joint initiative with Elston Partners, a Brisbane-based advisory firm specialising in Australian expatriates.

More at: <http://www.international-adviser.com/news/europe/feifa-links-with-aussie-expat-service>

# IFAonline.co.uk

**aop** Digital Publisher of the Year 2010

## FEIFA to offer service aimed at Australian expats

Author: Deborah Benn - International Investment | 17 Nov 2011 | 08:30

In a joint initiative with Australian-based advisory firm Elston Partners, the Federation of European Independent [Financial Advisers](#) (FEIFA) is to offer financial advice services to Australian expats

Read more: <http://www.ifaonline.co.uk/international-investment/news/2125627/feifa-offer-service-aimed-australian-expats#ixzz1e3MLdBUR>

## Fidelity partners with FEIFA

FROM EUROPE NOV 21 2011 BY: SIMON DANAHER

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Fidelity Worldwide Investment has become the latest company to join the Federation of European IFAs as part of its partnership programme.

Ben Waterhouse, UK head of retail sales at Fidelity, confirmed the partnership and said the company is looking forward to working alongside FEIFA and its members in the coming year.

Full article at: <http://www.international-adviser.com/news/europe/fidelity-partners-with-feifa>