

Chartered Banker
2025
Foundation





About the 2025 Foundation

The Chartered Banker Institute – the oldest institute of bankers in the world – was founded in 1875 to support the education and professional development of those entering the profession.

In the spirit of the original aims and objectives of the Institute, we have launched an ambitious new bursary scheme – the 2025 Foundation. Formally established at the end of 2016, the Foundation will aim to identify and support talented young people who would benefit from financial and other support to pursue a career in banking, and would otherwise find it difficult due to financial circumstances.

The Foundation has been launched with a donation of £155,000 from the Chartered Banker Institute, raised from the sale of the Institute's historical banknote collection.

Who will we help

The 2025 Foundation will award bursaries to individuals displaying the likely academic talent to gain a professional qualification in banking with the Institute or one of the Institute's learning partners, but are unable to pursue a course of study because of financial circumstances.

Applicants may include but are not restricted to:

- School leavers wishing to pursue a career in banking;
- Persons not currently in education or employment; and

- Minority groups currently under-represented within the banking profession.

Please note that financial assistance will be restricted to individuals currently living in the UK (and who have been living in the UK for at least 3 years prior to making an application). We regret we will not be able to offer assistance to overseas students.

Bursaries for Chartered Banker Institute qualifications

The Foundation will offer financial support to those who need and merit it. It will also offer other forms of support, such as mentoring.

Our aim is to ensure that individuals from whatever background, starting or developing their careers in banking, have an equal chance of achieving their goals based on merit, dedication and determination.

Grants and bursaries for students

The 2025 Foundation will support students who might face various financial pressures at different times throughout their academic banking careers, with grants towards the costs of examination fees, study materials, tutor support and other relevant costs.

Mentoring for students

The 2025 Foundation Mentoring Scheme will aim to bring together young people taking their first steps towards a career in banking with experienced Fellows (and other Chartered Bankers) who would be able to offer guidance, support and encouragement. This can be vital for individuals from a diverse range of backgrounds who might otherwise lack guidance and a professional network.

How the Foundation will be funded

Our initial target is to raise £1 million to support at least 200 Foundation Scholars between 2017 and 2025, which marks the Institute's 150th anniversary. Looking further ahead, we will continue to build the Foundation to support as many individuals as possible.



The 2025 Foundation will rely on voluntary income through:

- Donations from Fellows, Chartered Bankers and other members of the Chartered Banker Institute, which is a professional body with over 30,000 members throughout the UK and more than 50 countries worldwide; and
- Donations from corporates and individuals.

How the Foundation will be managed

The Foundation will be managed by a committee, chaired by David Thorburn (a former President of the Institute), and all members will be appointed by the Council of the Chartered Banker Institute. The 2025 Foundation Committee will be accountable to the Council of the Chartered Banker Institute for all its actions.

The committee members will be appointed for a three-year term and will be eligible for a single term of re-appointment thereafter.

The minimum number of committee members will be four, with a maximum of eight.

How can Fellows and members get involved?

Make a donation

You will be able to donate via an online donation page, which can either be a one-off donation or you can choose to pay monthly by direct debit.

We are asking Fellows and members who have benefited from the banking education provided by the Institute to put something back, by asking for a charitable gift of £2,025, an amount which links to the Institute's 150th anniversary in 2025.

Become a mentor

We are inviting Institute members with ten or more years' banking experience to apply to become a 2025 Foundation mentor. Applicants will be asked to complete a short application form and attend an interview with the 2025 Foundation staff and a member of the committee. The Institute provides a range of online resources on mentoring and there will be more advice and guidance developed for the 2025 Foundation mentors and mentees. Workshops and events for 2025 Foundation supporters and bursary

recipients will be arranged so best practice advice and guidance can be shared - as well as bringing together the current and future generations of professional bankers.

The benefits of participation

Every donation of money and/or time will contribute to the work of the Foundation. The greatest benefit for a supporter will be knowing that you have assisted a young person in establishing a banking career that they might not have had otherwise. Recognition can be in the form of:

- A commemorative certificate;
- Your name will be recognised on our website as well as in the Chartered Banker magazine;
- A 2025 Foundation lapel badge exclusive to supporters;
- A 2025 Foundation notebook and pen;
- Invitations to exclusive 2025 Foundation events and other Institute events; and
- Mentoring and training advice.

Mentors will also be able to count the time they spend towards their annual CPD requirements.



Celebrating 150 years

1875



Founded in
July 1875

1909



The Scottish Banker magazine is
launched, now known as Chartered
Banker magazine

1925



We celebrate our
first 50 years

2000



Institute granted the unique right to
award 'Chartered
Banker'

2001



The Financial
Education Partnership
(formerly the Banking
Education Partnership)
is established

2011



The Chartered
Banker Professional
Standards
Board (CB:PSB)
is established

201



1975



HM the Queen grants the Institute a Royal Charter

1988



Young Banker of the Year competition is established

1995



Continuing Professional Development is introduced

2

We are accorded Accredited Body status

2016



Membership reaches 30,000. Established the 2025 Foundation

2017



Launched the joint initiative Chartered Body Alliance. Formally launched the 2025 Foundation

2025



We hope to reach our target to raise £1M & be supporting at least 200 scholars

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