



Chartered Financial Planners

Proud of our status

Our Chartered status

We're proud to have been awarded the prestigious title '**Chartered Financial Planners**' by the Chartered Insurance Institute (CII).

This title is only awarded to firms committed to developing and maintaining the knowledge and capability of their people so they can deliver the highest quality advice.

Chartered firms must also follow a demanding code of ethical practice. This means they must work in a principled manner that places clients' interests at the heart of the advice they give.

Chartered status – granted by the Privy Council – is the industry's gold standard for financial planners and is currently met by fewer than 300 firms across the country.

Why you should use a firm of Chartered Financial Planners

Chartered status brings with it serious obligations. We are required to ensure the advice, service and ongoing support we provide to you is:

- Of the highest quality
- Based solely on your researched needs
- Provided by someone operating within their level of competency.

We meet our obligations in a number of ways...

- A commitment to the technical and professional development of staff, such as professional qualifications
- All staff members who deal with customers belong to the industry's professional body the Personal Finance Society (PFS), the dedicated financial planning arm of the CII Group, and adhere to its Code of Ethics which is enforced through disciplinary sanctions
- We adhere to the PFS's continuing professional development requirements, ensuring our staff keep their knowledge and skill-set up-to-date.

A Chartered title is a commitment to an overall standard of customer excellence and professionalism.