



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). The award of Chartered titles is strictly controlled by the Privy Council and is an objective measure of high standards of professionalism.

This title is only awarded to firms with a commitment to developing and maintaining the knowledge and capability of their people. It also signifies adherence to a demanding code of ethical practice.

Chartered status is the industry's gold standard and is currently met by only a select number of firms.

Why you should use a firm of Chartered Financial Planners

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

- is of the highest quality;
- is based solely on your researched needs;
- is 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 through professional qualifications. The majority of our executives hold a Chartered title in their own right;
- all staff members who deal with customers belong to the industry's professional body, the Personal Finance Society/CII, and adhere to its Code of Ethics and Conduct, which is enforced through disciplinary sanctions;
- we adhere to Personal Finance Society/CII continuing professional development requirements, thereby 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.