

## Why Chartered status matters for our firm

I am delighted to tell you that XYZ Company Limited has been awarded corporate Chartered Financial Planners status by the Chartered Insurance Institute (CII).

This is a highly-prestigious designation with demanding qualification criteria. It signifies to our customers and to the rest of the market that we are very serious in our pursuit of the highest standards.

It confirms that we have a commitment at the highest level to professional qualifications and it demonstrates our adherence to ethical good practice.

We are confident that being a Chartered firm will serve us well. It will sharpen our competitive edge with our customers, and it will cement relationships with other professional firms, which place great store on the right to bear a Chartered title.

As a condition of our being Chartered, the CII imposes certain requirements on staff to ensure that professional standards are maintained. In particular:

- Qualified staff who are members of the PFS/CII must comply with any CPD requirements (details can be found at [www.cpd.cii.co.uk](http://www.cpd.cii.co.uk))
- PFS/CII members must conform with the CII's Code of Ethics (details can be found at [www.cii.co.uk/code](http://www.cii.co.uk/code).)

An annual return needs to be made, by the firm, confirming these requirements have been met.

We will contact you with further information regarding our Chartered status, but in the meantime, please do not hesitate to contact me if you wish to discuss this fantastic achievement for our firm or visit [www.cii.co.uk/chartered](http://www.cii.co.uk/chartered) for additional background information.

Congratulations to all.