

Full version -

XYZ Company Ltd - Proud to be Chartered Financial Planners

We have recently been awarded the prestigious Chartered Financial Planners designation by the Chartered Insurance Institute (CII).

This is the industry's gold standard for firms of financial planners. It confirms that we have satisfied rigorous qualification criteria by retaining highly-qualified staff who subscribe to the membership conditions of the CII.

It also involves a commitment to continuing professional development and adherence to an industry standard Code of Ethics. You can view the Code at www.cii.co.uk/code

When you use a Chartered firm you are dealing with proven professionals. The CII is empowered by the Privy Council to award Chartered status, and the award is only made in deserving cases. And while Chartered titles are steeped in history, they remain the benchmark of professional excellence and integrity.

Only the UK's premier financial planning firms qualify for Chartered status. If you wish to know more about how using a Chartered firm can ensure you get the best possible advice, service and support, please do not hesitate to contact us.

Note: With over 100,000 members, the CII is the world's largest professional body dedicated to the insurance, savings and financial services sector.

Concise version -

Chartered status – what it means for you

We are a Chartered firm of financial planners. This means we have satisfied rigorous criteria relating to professional qualifications and ethical good practice. It means you can be confident that you are dealing with one of the UK's leading firms that is wholly committed to providing you with the best possible advice, service and support.