

# Introduction

If ever there was a time to demonstrate the value of true professionalism in financial planning it is now. While deep technical knowledge and sound ethical conduct have always been at the heart of our profession, public perception of the sector as a whole is often let down by the actions of a few.

We introduced Corporate Chartered status to rebuild confidence among businesses and consumers in the reliability and integrity of financial planning firms. This campaign promotes the value of that status to the public and how it is perceived by Chartered Financial Planners. It delivers a positive statement of what professionalism can do.

The 'Choose Chartered' campaign builds awareness and aspiration for Chartered status as the best demonstration of what it means to be a financial planning professional. As the standard becomes more widely understood, consumer demand will lead to an increase in the value of holding Chartered status.

Changing consumer perception is a gradual process, driven primarily by your actions, but you also have a role in communicating the difference that your status makes. This report summarises the extent and impact of the 'Choose Chartered' campaign to date, and further explains how you can also help promote Chartered status.



A stylized, handwritten signature in gold ink, consisting of a large, looping initial 'I' followed by a horizontal line that extends to the right.

Ian Simons ACII MCIM  
Director of Marketing, CII

## Objectives

People know what to expect from a Chartered Accountant or Surveyor, but not everyone currently recognises the true value of a Chartered Financial Planner.

Recent surveys conducted for the CII show that Chartered is the title people most commonly associate with professional advice.\* But its relatively recent adoption by financial planners means that it's still new to many.

The Choose Chartered campaign will increase awareness and interest among individuals with a need for financial advice. These gains will further enhance the value of the status that Chartered firms work hard to maintain.

The initial campaign launch in Q4 2015 has already shown a positive impact on awareness and intent to buy. For a more detailed analysis visit the [Impact](#) section of this report.

\*National survey of 2005 UK adults, conducted by Opinium in June 2015, indicated that 44% rated those holding Chartered status as the most professional.

1.



Increase value of Chartered status and encourage further take-up

2.



Raise awareness and increase preference among buyers

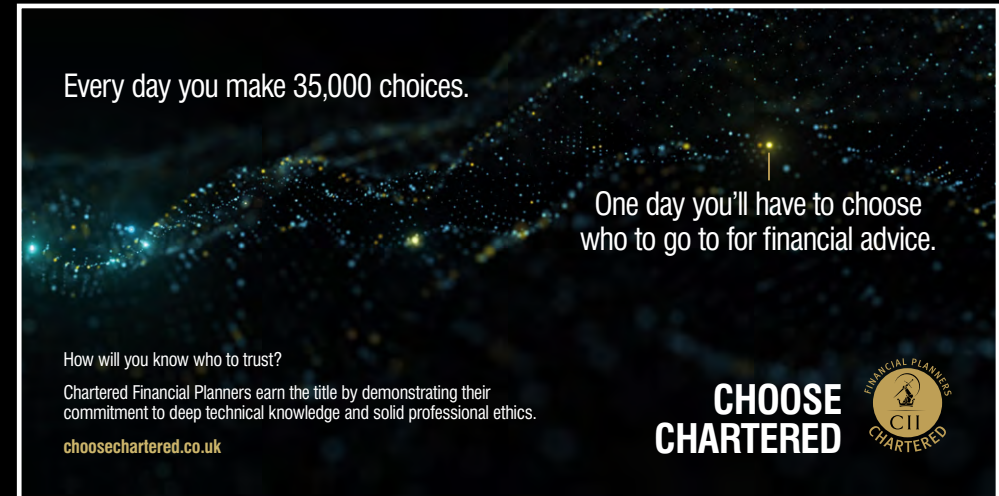
## Creative approach

Two different advertisements present the value of Chartered status to consumers and planners alike.

Financial planning requires people to make big decisions – thinking in particular about the long term impact of those decisions. It is a trust-based profession reliant on investors’ belief that the advice they are given is accurate and, crucially, given with their best interests at heart. The consumer campaign explores the importance of decisions about the future and how the Chartered standard offers a benchmark in professionalism.

The campaign to the sector uses an adviser to illustrate the value of Chartered to their business. An advertisement was developed through interviews with the subject to uncover their personal beliefs in the value of Chartered status as an indicator of professionalism, reliability, and trust.

Each advert culminates with “Choose Chartered”, a powerful call to action for consumers and the profession, recognising that Chartered firms are different, relevant and worth seeking out.



Consumer



Sector

## The Campaign

### Consumer

The campaign plan for the consumer audience comprised a mix of newspapers and selected outdoor sites known for their relevance to the target segment of business decision influencers and wealthy individuals (ABC1).

Its aim was to achieve broad awareness through November 2015 to January 2016 in high density locations across the UK.

Advertising was supported by video case studies and online content.



**See the work**

### Financial planning Sector

In addition to the consumer campaign, we have worked with financial planning sector media and the CII's own channels to develop awareness of the benefits of professionalism to the wider financial planning profession.

The adverts use a Chartered planner's own words to describe the direct benefits that they have experienced.



**See the work**

## The Campaign – Consumer

Outdoor Print Digital



### Placement

- 26 National rail stations
- 14 Tube stations
- 74 Buses – Edinburgh, Bristol, Birmingham
- 2 Airports – London City, Edinburgh

## The Campaign – Consumer

Outdoor Print Digital



Every day you make 35,000 choices.

One day you'll have to choose who to go to for financial advice.

How will you know who to trust?  
Chartered Financial Planners earn the title by demonstrating their commitment to deep technical knowledge and solid professional ethics.  
We believe it shouldn't be a difficult choice, on any day of the week.

[choosechartered.co.uk](http://choosechartered.co.uk)

**CHOOSE  
CHARTERED**



### Placement

The print campaign featured in the following publications.

**THE  TIMES**

**The Daily Telegraph**

**The Sunday Telegraph**

**CITYA.M.**

## The Campaign – Consumer

Outdoor Print Digital

The Telegraph website homepage as of Tuesday 02 February 2016. The main headline reads "Every day you make 35,000 choices". The navigation bar includes links for Home, Video, News, World, Sport, Finance, Comment, Culture, Travel, Life, Women, Fashion, Luxury, Tech, Cars, Film, and TV. A search bar is located at the top right. The main content area features several articles, including "Cameron's EU deal a 'slap in the face for Britain' as PM admits it won't cut migration", "Major Tim Peake's 'Cosmic Classroom'", and "Cycle paramedic and patient given surprise cup of tea - by David Beckham".

This is MONEY.co.uk website homepage. The main headline reads "Choose someone you can trust." with the CII (Chartered Institute of Investment) logo. The navigation bar includes links for Money Home, Markets, Saving & banking, Investing, Bills, Cars, Holidays, Cards & loans, Pensions, Mortgages & home, Experts, Buy-to-let, and Login. The main content area features a "Keep calm and carry on? Where fund managers are looking for unloved bargains in the stock market storm" article and a "BEST BUYS TABLES" section with categories like Credit cards, Cheapest loans, Savings accounts, and Current accounts.

### Placement

The online campaign targeted visitors to these web sites.

The Times Telegraph Guardian IOD This is Money FT online

## The Campaign – Sector

Print Digital

**“Clients need to know they’re talking to a professional.”**

The idea that financial advice is less about products, and more about clients and their life goals has to be substantiated.

People need to gain trust in professional advisers of every kind, and they rely on our knowledge and integrity to help them plan for the future.

I believe there is a balance between the commitment we make as advisers to our clients and the commitment we make to professionalism through upholding ethical standards and deepening our technical knowledge.

Chartered status is evidence of both.



Kevin Pratt, Chartered Financial Planner  
Managing Director  
Step by Step Financial Planners

Chartered is the gold standard for financial services.  
Choose it for your business.

[choosechartered.co.uk](http://choosechartered.co.uk)

**CHOOSE CHARTERED**



### Placement

The sector print campaign featured in these publications and reached an estimated 10,000 subscribers.

**money marketing**

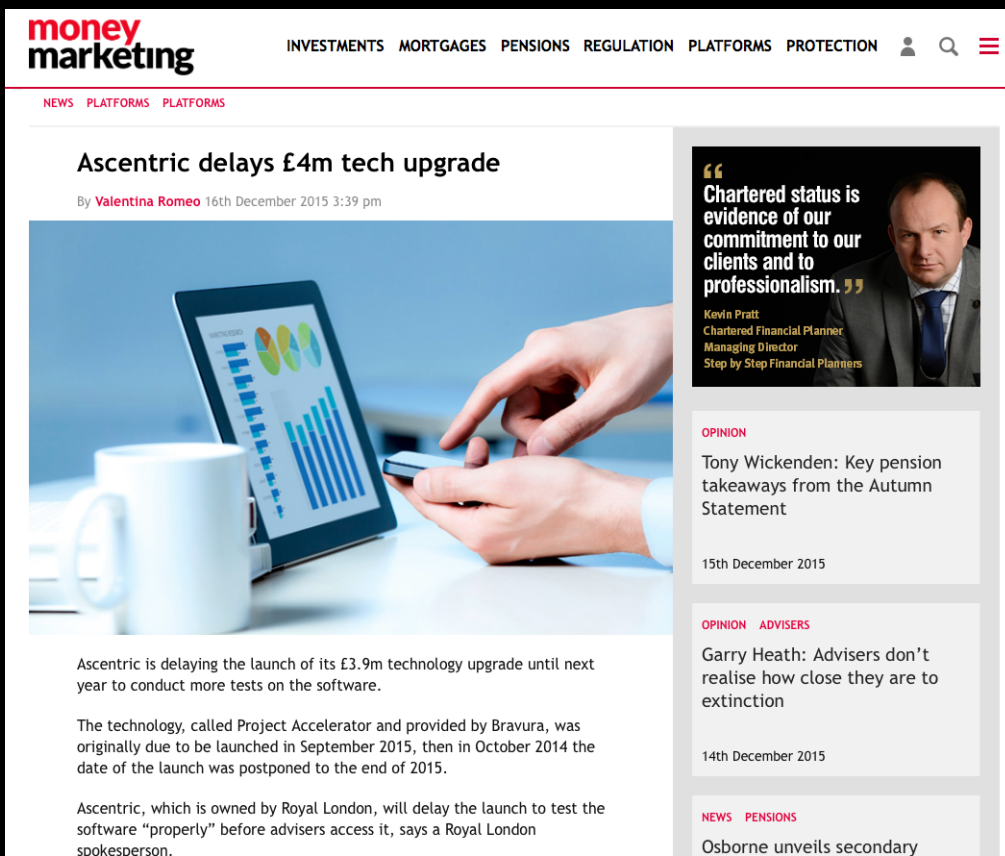
**FT ADVISER**

New  
Model  
**Adviser**



## The Campaign – Sector

Print Digital



**money marketing** INVESTMENTS MORTGAGES PENSIONS REGULATION PLATFORMS PROTECTION

NEWS PLATFORMS PLATFORMS

### Ascentric delays £4m tech upgrade

By **Valentina Romeo** 16th December 2015 3:39 pm

**“Chartered status is evidence of our commitment to our clients and to professionalism.”**

Kevin Pratt  
Chartered Financial Planner  
Managing Director  
Step by Step Financial Planners

**OPINION**

Tony Wickenden: Key pension takeaways from the Autumn Statement

15th December 2015

**OPINION ADVISERS**

Garry Heath: Advisers don't realise how close they are to extinction

14th December 2015

**NEWS PENSIONS**

Osborne unveils secondary

Ascentric is delaying the launch of its £3.9m technology upgrade until next year to conduct more tests on the software.

The technology, called Project Accelerator and provided by Bravura, was originally due to be launched in September 2015, then in October 2014 the date of the launch was postponed to the end of 2015.

Ascentric, which is owned by Royal London, will delay the launch to test the software "properly" before advisers access it, says a Royal London spokesperson.



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**FT ADVISER**

Osborne risks leaving advisers trailing behind  
John Lappin

How to force mis-sold trackers out of the closet  
Dan Jones

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### TOP STORIES

Investments | 08:21  
**Canada Life plans global multi-asset income fund**  
2016 launch in addition to new UK property fund.

**Canada Life**

HMRC defends state pension data errors

Fidelity to enter ETF market

**IN FOCUS**

- Pension Freedom
- Financial Advice Market
- Protection in Numbers

**LATEST NEWS**

Regulation | 11:48  
**FCA audit questions regulator's market sensitivity**  
Internal audits into the FCA found issues around market sensitive information and crisis management.

Mortgages | 11:43  
**Santander creates two-tier buy-to-let affordability test**  
Spokeswoman said this change reflects the firm's "continued prudent approach" to lending and affordability.

**Chartered is the gold standard for financial services.**

Choose it for your business.

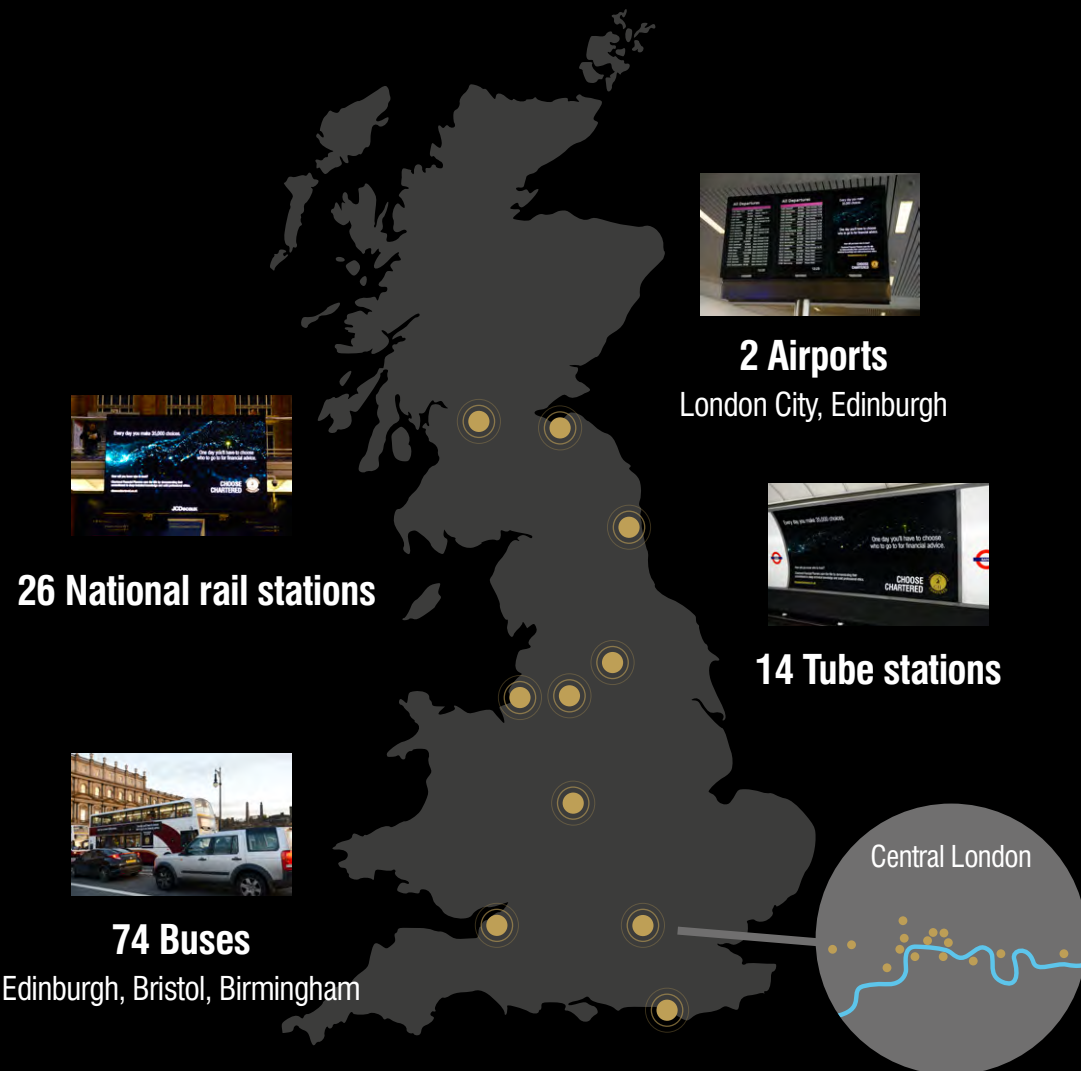


### Placement

Over the course of the initial campaign launch, multiple formats of online advertising were placed on targeted sector websites.

Money Marketing online FT Advsiior

## Impact



**4** million  
**Total coverage**  
23.66% of all ABC1 Adults over the age of 35 (equivalent to 4 million) have, on average, seen this campaign 3 times.

**2.9** million  
**National Press**  
17% of ABC1 Adults over the age of 35 (equivalent to 2.9 million) have, on average, seen this campaign 3 times.

**1.4** million  
**Digital**  
8.5% ABC1 Adults over the age of 35 (equivalent to 1.4 million) have, on average, seen this campaign 3 times.

**70%**  
Awareness of Chartered status in Financial Services.\*

**62%**  
Confidence that Chartered status is the best indicator of professional conduct.\*

**77%**  
Likelihood of choosing a Chartered firm (over a firm without Chartered status).\*

\*Based on a survey of 1038 HNW business directors or SME owners during January and February 2016.

## Future plans

The initial impact of the 'Choose Chartered' campaign highlights the potential for developing public awareness and understanding; over time we will build on this to increase intent to actively choose Chartered firms.

During 2016 we will continue the campaign, with regular reviews of impact and effectiveness, reflecting on what we're saying and where we're placing our message.



### Building recognition

During the second quarter of the year, we will select consumer press titles, digital platforms and outdoor sites to build on awareness achieved in first phase of the campaign.



### Developing the Chartered story

As awareness builds we will broaden the message with new creative treatments. We will rotate outdoor media, and trial spots on broadcast radio.



### Maintaining momentum

Continue with selected press, digital and outdoor sites, add financial planning sector titles to playback to members and Chartered firms.

## How to get involved

### Share the campaign

The resources that we have created for the campaign can enhance the value of Chartered status for any firm, so we encourage all Chartered firms to consider where they could use them.

We will happily supply copies for use in the following formats:

- As advertising in your newsletters or magazines (PDF)
- Standard size web banners for use on your web site (GIF)
- Video for use on your website or in social media (MPG4)
- As an email footer to your communications (JPG)

And do share what you're doing with us and other Chartered firms by tweeting examples to [#ChooseChartered](#).

## Resources

Having helped launch the campaign, we hope you will help in maintaining its momentum. We are delighted to make these resources available to you. Further resources can be found at [cii.co.uk/chartered](http://cii.co.uk/chartered)

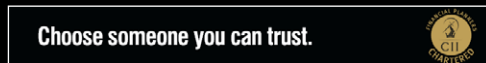
### A4 Press advert

210 x 297mm



### Web banners

Leaderboard 728 x 90 pixels



MPU 350 x 200 pixels



### Email footer

600 x 100 pixels



### Video



[Click here to download any of the above assets](#)