



Chartered
Insurance
Institute

Standards. Professionalism. Trust.



Chartered
Financial
Planners

Guidance on public statements concerning your Chartered status

Promoting your Chartered status is as important as gaining it in the first place. While we encourage active promotion of corporate Chartered status as a point of difference for your firm, it is important to ensure that what you say about it is accurate. This guide outlines the facts and gives examples of the preferred language so that when talking about being Chartered you give a clear reflection of the ethos, the commitments and the benefits to customers of Chartered status.

The aim of corporate Chartered status

The purpose of Chartered status is to improve public trust in the professionalism of insurance and personal finance. Corporate Chartered status involves a shared public declaration of professional standards – from the CII and from Chartered firms.

The Chartered Ethos

The Chartered Ethos has three central themes: nurturing knowledge, client centricity and serving society.

Nurturing knowledge

All Chartered firms commit to the ongoing development of their people, ensuring that their knowledge and competencies remain up to date.

As the awarding body, the Chartered Insurance Institute provides flexible learning pathways, leads research, and facilitates communities and good practice.

Client centricity

Chartered firms have in place core values, business practices and a diversity and inclusion policy that aligns with the CII Code of Ethics and puts customers first.

Serving society

Chartered status is a universal badge of professionalism in which society can put its trust. The Chartered Insurance Institute and Chartered firms drive initiatives focused on social good and promote public awareness of Chartered status.

Commitments on the part of the firm

Corporate Chartered status involves a public declaration of professional standards, encompassing a series of commitments – made openly, transparently, and in full view of the firm’s customers and clients.

This includes a commitment to ongoing people development, alignment of ethics and values, committing to customer first values, supporting wider social initiatives, and wearing the ‘Chartered badge’ with pride.

The benefits to customers of Chartered firms

Customers of Chartered firms can depend on the firm’s professionalism, expressed through a commitment to ethical practice and the provision of competent and knowledgeable advice based around their needs and requirements.

Referring to titles

please note capitalisation of terms

In writing, please refer to your firm with the correct title e.g.

‘Brand X is a Chartered Financial Planner’

‘Brand X recently achieved corporate Chartered status.’

‘The Chartered Insurance Institute is the professional body for Insurance and Personal Finance.’

Explaining differences - the facts

There are differences between Chartered firms and those who have not chosen to be Chartered. Being Chartered is not about being ‘better’, ‘more professional’ or ‘more trustworthy’. The difference is that they have made a public declaration of professional standards.

Suggested terminology

Refer to your people as:	Chartered professionals
Refer to your qualification status as:	Experienced in the field, qualified at an advanced level
Refer to your ethical commitment as:	Publicly committed to values that align with a professional code of ethics
Refer to your continued professional development as:	Committed to continued professional development and contribute to a community of professional good practice

Other terms

Avoid using superlatives that may be hard to justify. Instead, use simple descriptions of the nature of Chartered professionals.

What we shouldn't say	What we should say
Elite	Exceeding minimum standards required
Gold standard	Committed to professional standards
Highest ethical standards	Committed to values that align with a professional code of ethics.
Trusted	Accountable/aspirational - always striving to improve