





Chartered
Insurance
Institute
Standards. Professionalism. Trust.

What Chartered means for you



The Chartered Insurance Institute
3rd Floor, 20 Fenchurch Street
London EC3M 3BY

tel: +44 (0)20 8989 8464
customer.serv@cii.co.uk
cii.co.uk

 Chartered Insurance Institute
 @CIIGroup

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You're dealing with Chartered Financial Planners

The title Chartered Financial Planners is awarded to companies that make a public declaration of their commitment to professional standards. It is granted by the Chartered Insurance Institute (CII), the professional body for personal finance, dedicated to building trust in the insurance and financial planning profession.

Every firm that holds Chartered status adheres to an ethical code that underpins broader commitments to professional values. These include putting customers' interests first, investing in ongoing development of their people's technical skills and knowledge, and supporting wider initiatives that benefit society as well as the growth of the profession.



Only Chartered Financial Planners are entitled to use this logo, the outward symbol of their commitment to the Chartered Ethos.

Chartered firms are publicly committed to professionalism

In every Chartered firm, the majority of frontline staff will be members of their professional body, and you will have access to a Chartered Financial Planner at your request. Members have access to industry-leading technical intelligence, education and training. They help shape the profession and its response to changing times, and they are obliged to maintain their technical knowledge through continuing professional development.

In choosing a Chartered firm you can be sure that its people have made a commitment to being ethically driven, knowledgeable and to providing competent advice that is based wholly around your needs and requirements. It also means that as a firm, it is committed to providing a high quality of service and support.

You can find more detail on the aims, standards and what makes a firm Chartered online at [cii.co.uk/chartered](https://www.cii.co.uk/chartered). You can also look up any company and confirm its status using our Chartered firm search.