



Chartered Status Our big investment

Standards. Professionalism. Trust.

What our Chartered status means for you

What do you look for in your firm of financial advisers? That it is ethical and puts your interests first? That its people are competent, knowledgeable and committed to maintaining their professional capability?

Those are precisely the qualities embodied by Chartered status – the reason we are proud to have achieved the title Chartered Financial Planners.

Chartered status is a public commitment to professional standards. It is awarded to firms who demonstrate development of knowledge, enhanced capability and maintain ethical standards.

The title Chartered Financial Planners is granted by the Chartered Insurance Institute, the professional body for insurance and personal finance.

Chartered firms must meet serious obligations

To retain our title, we ensure that we're accountable for the standard of advice, service and support we offer to you.

Our advice must be based solely on your researched needs and provided by someone competent to discuss products and services that meet your requirements.

- We maintain our technical and professional knowledge and competence through professional qualifications.
- We keep our knowledge and skills up-to-date through continuing professional development.
- Our staff are members of the Personal Finance Society and abide by its code of ethics.

Being a Chartered financial planning firm means that at least 25% of our advisers are Chartered individuals, giving our customers access to a Chartered financial adviser at all times.

It is our policy to maintain these standards. The Chartered mark represents our commitment to professionalism and putting our customers first.