





**What our  
Chartered  
status  
means  
for you**

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## You're dealing with a Chartered firm

Our Chartered title is a public declaration of our commitment to professional standards. It was granted by the Chartered Insurance Institute (CII), the professional body for personal finance, dedicated to building trust in the insurance and financial planning profession.

Holding Chartered status means we adhere to an ethical code that underpins broader commitments to professional values. These include putting your interests first, investing in ongoing development of our people's technical skills and knowledge, and supporting wider initiatives that benefit society as well as the growth of our profession.



As a Chartered firm we are entitled to use this logo, an outward symbol of our commitment to the Chartered Ethos.

## We are publicly committed to professionalism

To hold Chartered status as a firm, the majority of our frontline staff must be members of their professional body and we will give you access to a Chartered Financial Planner at your request. As CII members we all have access to industry-leading technical intelligence, education and training. We help shape the profession and its response to changing times, and we are obliged to maintain our technical knowledge through continuing professional development.

In choosing a Chartered firm you can be sure that our people have made a commitment to being ethically driven, knowledgeable and to provide competent advice that is based wholly around your needs and requirements. It also means that as a firm, we are 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://cii.co.uk/chartered). You can also look up any company and confirm its status using the CII's Chartered firm search.