



Personal
Finance
Society

Standards. Professionalism. Trust.

A photograph of two women in a professional setting. The woman in the foreground is smiling warmly at the camera, wearing a white and black checkered blouse. The woman in the background is seen in profile, wearing glasses and a dark top, looking towards the first woman.

Financial advice you can trust

Chartered Financial Planner

Financial advice you can trust

All Chartered Financial Planners have completed degree level professional qualifications and have at least five years' relevant professional experience. They adhere to a code of ethics and commit to ongoing professional development.

Chartered Status

Chartered status is a public declaration of adherence to professional standards and demonstrates a commitment to proudly uphold ethical standards. You can be confident that a Chartered Financial Planner can be relied upon to consider your personal circumstances and devise a plan to help provide you with a secure financial future.

Like Chartered Accountants, Surveyors, or Engineers, you can trust Chartered Financial Planners to be highly qualified, reputable and capable of providing you with high quality advice with the utmost integrity.

Statement of Professional Standing

Financial planners are required to evidence their adherence to the Code of Ethics through a valid Statement of Professional Standing. This Statement confirms that they are professionally qualified and have committed to continually updating their knowledge.



Meeting your expectations

The Personal Finance Society is the UK's leading professional body for the financial planning community. Our 38,000 members commit to high professional standards by adhering to our Code of Ethics and ensuring their technical knowledge is kept up to date.

We are uniquely placed to support consumer demands for trusted and professional financial advice. We work with the regulator and Government to help shape the future environment within which professional financial advice is given.

We are part of the Chartered Insurance Institute Group, the world's leading provider of professional training, qualifications and thought leadership to the insurance and financial planning profession.

Both the Personal Finance Society and the Chartered Insurance Institute are focused on engendering public confidence and trust across the financial planning community.

Earning your trust

Members of the Personal Finance Society are required to earn and maintain the trust of clients at all times by following our Code of Ethics. The Code helps to ensure that all members act in the best interests of their clients, of the Personal Finance Society and their profession.

Members will:

- Act with ethical standards and integrity
- Act in the best interests of each client
- Provide a high standard of service
- Treat people fairly, regardless of: race or racial group; sex or sexual orientation; religion or belief; age; and disability.

Putting you first

Your Chartered Financial Planner has given you this leaflet to confirm that they are a Chartered member of the Personal Finance Society.

The Personal Finance Society sets standards of knowledge, professional development and ethical behaviour to help protect consumers. You can be reassured that your Chartered Financial Planner is associated with high standards of professionalism.

You can confirm your financial planner's membership and qualification by visiting [thepfs.org/membersearch](https://www.thepfs.org/membersearch)

Complaints

If for any reason you have a concern or wish to make a complaint, please let your financial planner, or the firm they work for, know. Complaints and grievances will be taken seriously.


Additionally, complaints about the conduct of a member should be brought to our attention so that we can consider disciplinary action.


Please visit [cii.co.uk/complaints](https://www.cii.co.uk/complaints) in the first instance.

The Personal Finance Society

42-48 High Road
South Woodford
London, E18 2JP

tel: +44 (0)20 8530 0852
customer.serv@thepfs.org
[thepfs.org](https://www.thepfs.org)

 The Personal Finance Society

 @pfsconf

© Chartered Insurance Institute 2019