



Chartered
Chartered Insurance Institute

Corporate Chartered Summer 2026 update

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Corporate Chartered Update

Over the past year, we have been reviewing how Corporate Chartered can deliver greater value for firms, their people and their customers – while continuing to represent the highest professional standards.

Why we're making changes

In 2025, we consulted widely with both Chartered and non Chartered firms. Feedback showed strong support for the aims of Corporate Chartered, alongside a clear message that:

- the status needs to be more visible and meaningful to the public
- standards must remain robust
- firms want clearer value as part of their Chartered recognition

What we've been doing

Following the consultation, we refined the proposed criteria and began a test phase with several dozen firms to:

- trial how Chartered applications could work in practice
- understand what good evidence looks like
- ensure the process is fair, proportionate and practical

This phase has helped us identify where firms already meet the proposed rules and where further guidance or refinement is needed.

What we've learned

- **Less tick box, more conversation:** Future applications will be more consultative, focusing on how firms demonstrate professionalism and customer outcomes in practice.
- **Use what you already have:** Firms can submit existing evidence produced for regulators, auditors or internal governance. This is not about requesting new documents for the sake of it.
- **Clearer guidance:** Firms want to know what 'good' looks like. We are developing benchmarks, examples and resources to support this.
- **Better systems:** We are building a new online application portal that is intuitive and efficient to use.
- **Phased rollout:** Some criteria are already widely met; others need more time to ensure they are achievable and fair for firms of all sizes. Changes will therefore be introduced in phases, starting with those that present the fewest challenges for firms, but which will have the greatest positive impact.

What's changing - and when

From 2027, new applicants will need to meet the new Corporate Chartered rules and eligibility criteria.

Existing Chartered firms will be able to renew under either the current or new criteria for up to 18 months after the changes take effect.

Ahead of this, from July 2026, Chartered firms will be invited to start sharing evidence at their next renewal against an initial set of new criteria. This allows firms to prepare early and helps us set realistic benchmarks.

New evidence requirements from July 2026:

Nurturing knowledge

Firms will be asked to demonstrate:

- a published commitment to developing staff appropriately to their role
- market-leading levels of appropriate qualifications by role
- market-leading levels of professional membership and CPD per role
- active engagement with the Local Institutes or PFS Regions and support employee involvement in and attendance at CPD events
- an appropriate Skills development plan for employees that includes measures, targets and accountability.

Serving society

- a responsible Artificial Intelligence and Data strategy that is aligned with the CII Code of Ethics and the FCA's guidance on the treatment of customers in vulnerable circumstances

Client centricity

- that employee understanding of key issues impacting customers and their ability to respond appropriately to people's different needs is kept up to date through annual CPD
- training and reward structures that enable and empower our employees to ask open questions and help find solutions
- a comprehensive Consumer Duty strategy and uses our FCA reporting to drive better outcomes for our customers
- a published, customer-centric purpose statement that includes organisational values and is aligned with the CII Code of Ethics and the FCA's Consumer Duty outcomes.

Support for firms

To support these changes, we are:

- launching a new, more intuitive application portal
- expanding the CII team supporting Chartered applications
- publishing guidance, templates and checklists informed by firms in the test phase

Adding value to Chartered status

We are also strengthening the benefits of being Chartered by:

- offering exclusive thought leadership and research opportunities for Chartered firms, building on the launch of our first programme that explored Vulnerable Customers' Lived Experiences.
- commissioning new consumer research into professionalism and awareness of Chartered status
- increasing public promotion of what Chartered status represents and why it matters

What comes next

Some proposed criteria require more preparation time. Later in 2026, we will confirm timelines for future changes.

Nurturing Knowledge

Firms will be asked to demonstrate:

- that they invest in the future of the profession, recruiting and supporting new entrants through pathways to professionalism
- that they conduct or contribute to good practice, research or CPD to the benefit of the wider profession

Serving Society

- that they operate robust governance processes that can be clearly evidenced
- a published sustainability policy
- a published inclusive recruitment policy and evidence of EDI programmes, including pay gap analysis and board representation

Client Centricity

- that they actively signpost relevant guidance, other products and services that meet their customers' needs, not just what they would prefer to sell to them
- a published transparency policy and can demonstrate an effective communication review and improvement process, with a particular focus on vulnerable customers
- that they publish all fees and charges (or fee bands and definitions) clearly and can demonstrate these are fair and understood by our customers

We will also consult further on fee structures and membership requirements to ensure fairness across different types and sizes of firm, while maintaining high professional standards.