Personal
Finance
Society
Standards. Professionalism. Trust.

Corporate Chartered Status Toolkit

Embedding and promoting the Chartered ethos

Use the tabs at the top of this page to navigate through the toolkit. Wherever you see an icon, this indicates that there's an asset for you to download.

July 2026

Click here to ensure you're viewing the latest version of the Chartered toolkit

Chartered status is something to be proud of.

Congratulations on achieving Chartered status. It takes commitment to be Chartered, but you're not on your own.

We've devised this toolkit to help you promote your Chartered status within your business and to your clients and other stakeholders.

The toolkit gives guidance for embedding the Chartered ethos into your business as well as materials and ideas for how to make your commitment to professional standards all the more public.

We all benefit from clear communication of the ethics and values of Chartered status—society, Chartered firms and the profession as a whole.

Our vision is that together, we achieve 'parity of esteem' with established professions such as medicine and accountancy. A commitment by firms of all sizes to the Chartered ethos, expressed through a shared public declaration to professional standards, is an essential step on this journey.

Matthew Hill
Chief Executive, CII Group

About the toolkit

While most people know about Chartered status in other professions, it's less well established in our own. That makes it all the more important we do all we can to celebrate the achievement within the business and to promote it outside.

This toolkit provides a range of assets to help you get the most out of your Chartered status. We are continuously developing and adding to these assets, and will keep you updated as soon as more items are available for you to use.

Internal communication
How to make the commitment meaningful

The Chartered ethos is shared between the Personal Finance Society and every Chartered firm; it's a joint commitment to define and develop standards of professionalism in financial planning, and demonstrate the value of an ethical approach to business.

By becoming a Chartered firm, your business is making public its commitment to uphold those ideas. For our part, it's important we give you all the support you need to do that.

This toolkit includes materials and ideas to help, from top line presentations, celebrating the achievement with all your employees, to the detail of the Code of Ethics – the centre-piece of an approach that focuses business around customer needs.

External communication
How to promote Chartered status

Looking outside the business there are more ways to promote your Chartered status to clients and other stakeholders. As a mark of professionalism it can be placed in any corporate communications.

Please use the materials accessible from this document freely to promote your Chartered status. Each of the components has its uses in raising awareness and understanding of the meaning and value of being Chartered.

If you prefer to create your own communications, then all we ask is that you respect the spirit of these documents and only present Chartered status for what it is; a shared declaration of professional standards serving the interests of society.

Wherever possible, we will create assets that have the ability to be dual-branded.

If you have any further suggestions on what we can include within the toolkit, please get in touch.

Spreading the news throughout the firm

Code of Ethics Practical Guide
How to incorporate ethical ideas into day-to-day business

Promoting your Chartered status to the public

Video content
What being Chartered means to clients animation

Chartered logos and guidelines
All the branding you need to identify yourself as a Chartered firm

Customer handout
A simple statement about the status

Boilerplate
Chartered status in a line

Press releases
Guidelines for corporate communications

Chartered certificate
Official recognition of your award

Web banners
To promote your status on your web site

Social media graphics
To add to tweets and posts

Animated logo
To add to presentations

Chartered wall plaque
Your commitment made physical

Chartered window stickers
Eye-catching signage

Spreading the news throughout the firm

Code of Ethics Practical Guide

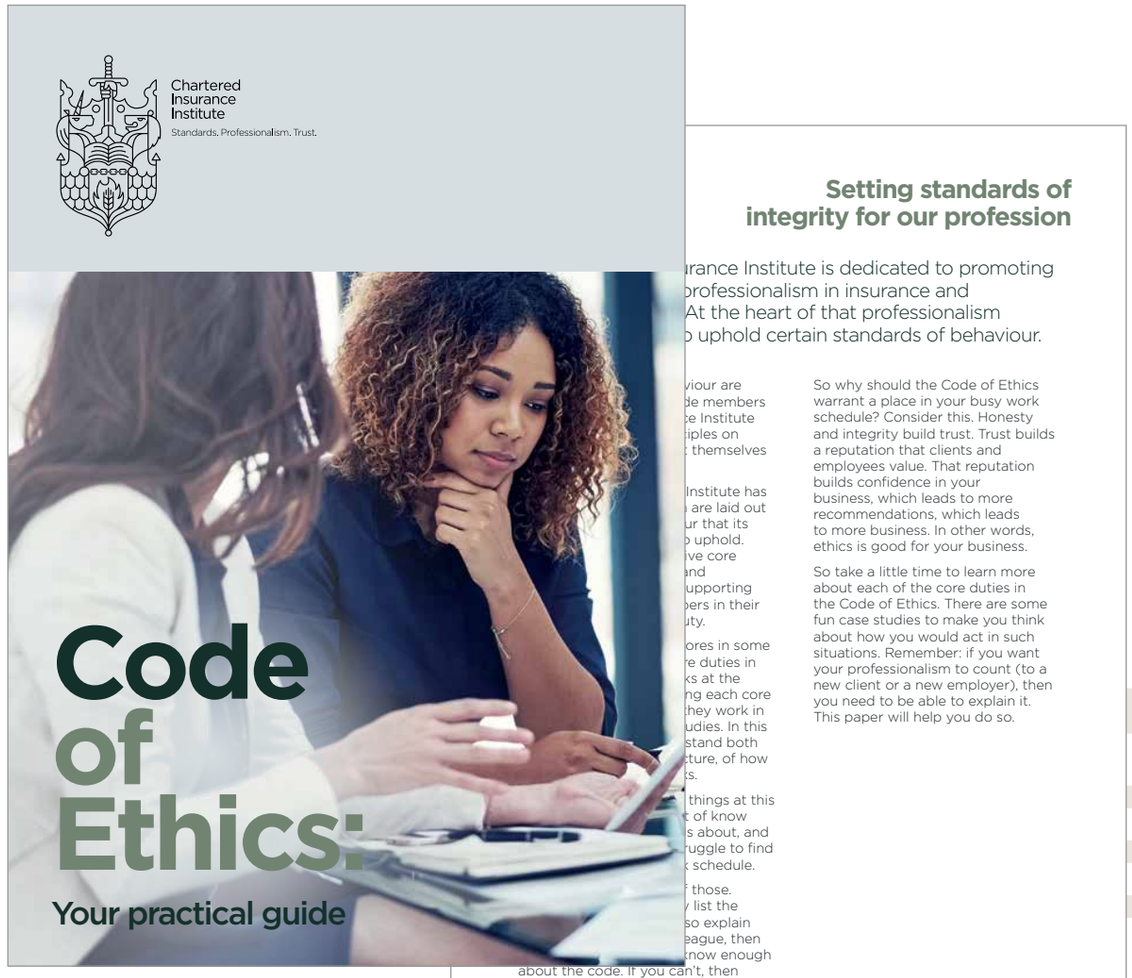
How to incorporate ethical ideas into day-to-day business

For chapter and verse on what it means to be Chartered, there's no substitute for the complete Code of Ethics. But it's a necessarily detailed document, going into depth on the responsibilities and the ideal behaviours of professionals in personal finance.

This practical guide is a combination of an introduction to the key concepts and suggestions on how to implement the Code.

It makes it easy for everyone in the company to understand the principles in the Code and consider how its guidance can be employed day-to-day.

View/download the practical guide >



Promoting your Chartered status to the public

Video content

What being Chartered means to clients

The central aim of the Chartered ethos is to increase public trust in our profession. This short film explains why clients can be sure their interests come first.

You could use the video as an opener to a client presentation, post it on your web, promote it via LinkedIn or other social channels or distribute it via email for everyone to see.

It describes the ‘contract’ supported by us, between Chartered firms and the public - explaining their commitment to professionalism and what it means for clients.

View/download the video >

Promoting your Chartered status to the public

Chartered logos and guidelines

All the branding you need to identify yourself as a Chartered firm

This includes all the logos you are likely to need on any form of communication, along with guidelines for their use.

You can place them on everything from email signatures to corporate web pages, social media, printed brochures or letterheads. The logos form an important part of distinguishing you as a Chartered firm.

View/download the logos >

View/download the guidelines >

Promoting your Chartered status to the public

Customer handout

A simple statement about the status

Personally hand out or enclose this flyer in mailings of every kind to new and potential customers to be sure they understand what makes your firm stand out – your commitment to the Chartered ethos.

Available as a PDF for immediate download, or as a printed version. To order contact your dedicated corporate Chartered team on 0208 530 0818 or email charteredfirm@cii.co.uk

If you would like to create a dual-branded version of the handout, email charteredfirm@cii.co.uk to be sent the In Design artwork file.

View/download the handout >

Promoting your Chartered status to the public

Boilerplate

Chartered status in a line

Use this statement about Chartered status as a sign-off in corporate communications. It's the same for everyone, and it keeps things consistent aiding wider understanding.

"We are Chartered Financial Planners, publicly committed to a customer-first approach and values that align with a professional Code of Ethics. We'll provide solutions relevant to your needs, maintaining our knowledge through qualifications and ongoing professional development."

Promoting your Chartered status to the public

Press releases

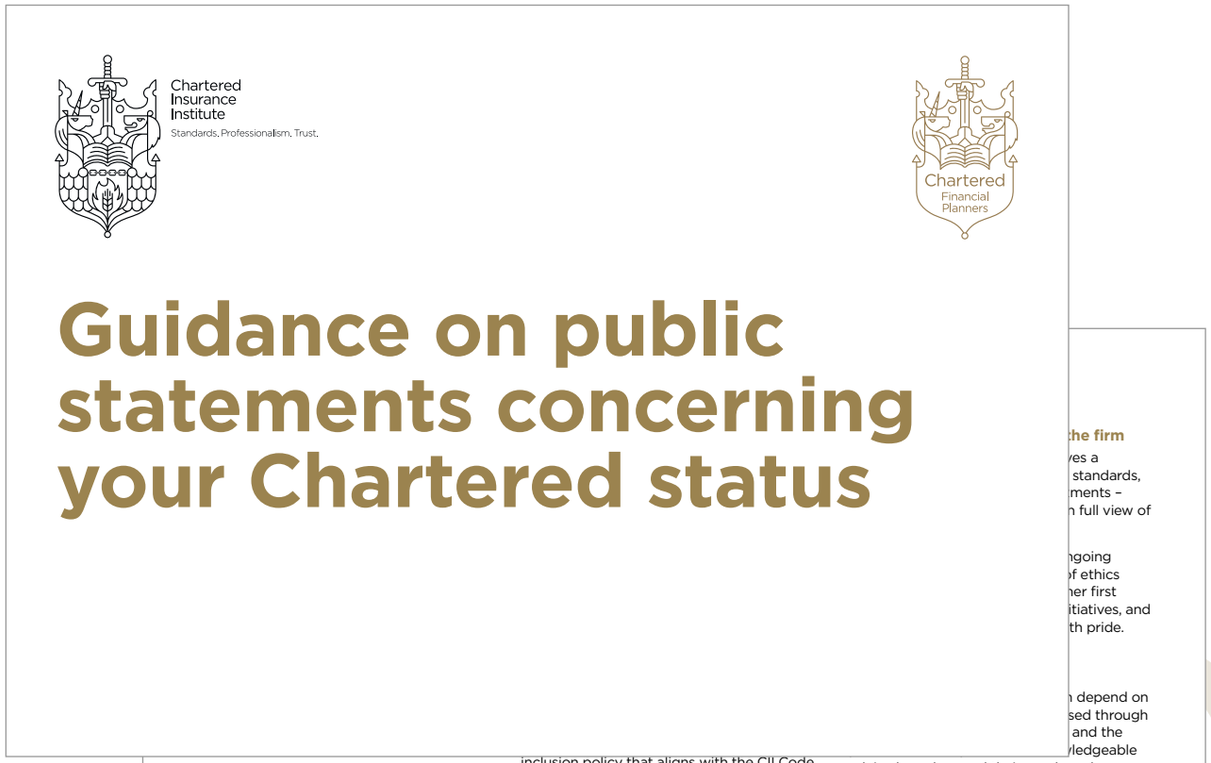
Guidelines for corporate communications

It's good to be able to mention Chartered status in corporate communications or to know how to refer to it for media relations, but while it may mean different things to different firms, we should all describe it consistently for public consumption.

This guide and example press release is clear on the language we should use to describe Chartered. By being consistent we will ensure that public understanding of Chartered status is increased.

View/download the communications guide >

View/download the example press release >



Promoting your Chartered status to the public

Chartered certificate

On successful application for Corporate Chartered status, you will be issued with a certificate directly from the CII.

These are produced to an exceptional standard, with the name of your firm hand-written by a professional calligrapher, and issued in the name of our Royal Patron, his Majesty the King.

Promoting your Chartered status to the public

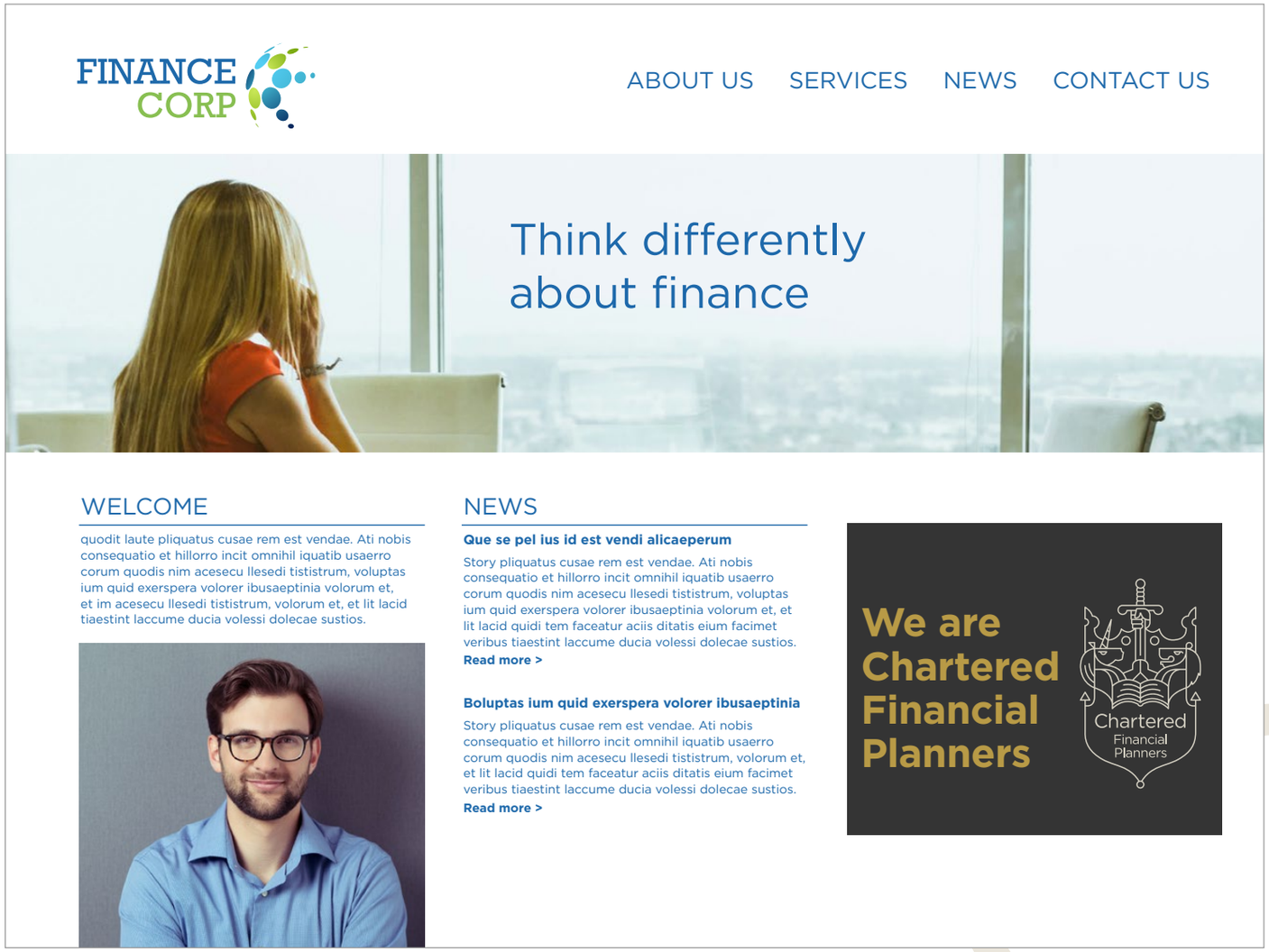
Web banner

Promote your pages

Place this banner on appropriate pages within your website to demonstrate your Chartered title. This could be on your homepage, ‘About us’ page, or anywhere that you talk about your firm’s commitment to professionalism.

There are different sizes available to provide flexibility on where they can be placed.

View/download the web banners >



Promoting your Chartered status to the public

Social media graphics

Brighten blog posts and fire your feeds

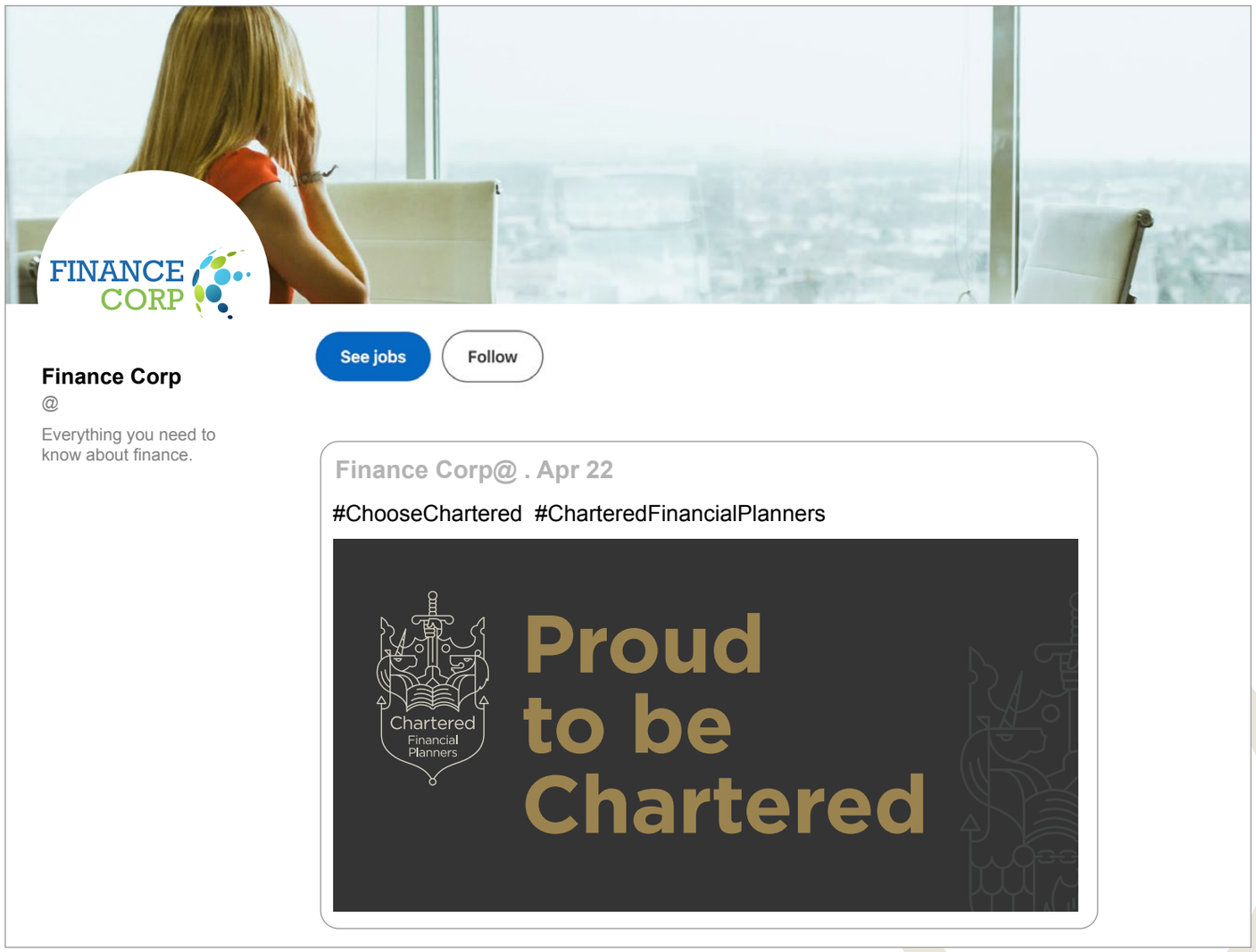
Use these graphics in digital media to support posts and tweets - some of which are animated to increase interest and engagement.

Select the ideal format to place in LinkedIn or X messages.

To build momentum and interest around Chartered it will also help if you accompany your posts with:

#ChooseChartered
#CharteredProfessionals
#CharteredFinancialPlanners

View/download the graphics >



Promoting your Chartered status to the public

Animated logo

Add this bumper to Powerpoint presentations

This little animated ident will establish your credentials up front in any Powerpoint presentation. Use it as an endorsement, or as an ice-breaker.

View/download the animation >

Promoting your Chartered status to the public

Chartered wall plaque

Your commitment made physical

This plaque is a solid reminder to staff and visitors alike of your commitment to the Chartered ethos.

Each firm's first Chartered plaque is free - order yours direct from the corporate Chartered team on 0208 530 0818 or email charteredfirm@cii.co.uk. The plaque comes complete with simple fitting instructions.

Promoting your Chartered status to the public

Chartered window stickers

Eye-catching signage

Easy to apply and highly visual window stickers set the tone for visitors. Free to order from the corporate Chartered team on 0208 530 0818 or email charteredfirm@cii.co.uk

Hints & Tips

1. Tell prospective employees

Include details in job descriptions and adverts and incorporate in your company welcome pack. Chartered status is a clear indicator of the professional standing of your firm. People like to work for companies that help to develop their staff and as a Chartered firm you are committed to ongoing standards of technical excellence and ethical behaviour.

2. Notify existing customers

Inform existing clients of your new status in writing – a great opportunity to refresh contact.

Explain the meaning of the title, how it underpins good practice and excellent customer service and is a commitment to ethical behaviour.

3. Create a referral network

Contact other professional services firms in your area – accountants, solicitors, surveyors – and form a network of like-minded professionals who can cross-refer clients when appropriate.

4. Include links to the CII

Wherever you use the Chartered logos online, include a link to the CII's 'Why choose a Chartered firm' page.

5. Be accessible to new customers

As a Chartered firm, you are eligible for inclusion on the CII's online publicly searchable directory of Chartered firms. This includes details of the classes of business you deal with, together with your firm's contact details. The responsible member of your firm can update your details here or by emailing charteredfirm@cii.co.uk

Contact

Ordering materials

Contact your dedicated corporate Chartered team on 0208 530 0818 or email charteredfirm@cii.co.uk

Feedback

We welcome your input on this toolkit, including ideas for inclusion and improvement. If you have any suggestions please contact your dedicated corporate Chartered team on 0208 530 0818 or email charteredfirm@cii.co.uk