

# Working together

A trusted professional connection



**Personal Finance Society**  
Standards | Professionalism | Trust



# Chartered Financial Planner

The role of a financial planner is to help individuals and businesses understand their financial circumstances and to help them plan for the future.

This usually includes tax, investment and retirement planning but may extend to more specialist services such as wealth management, trustee investment, divorce and non-domiciled clients.

In 2005 the Privy Council granted the Chartered Insurance Institute (CII) the power to award Chartered Financial Planner status to those financial advisers that had successfully completed a suite of advanced level professional qualifications and who could demonstrate a minimum of five years' experience working as a financial adviser.



## Working in partnership with other professionals

Many Chartered Financial Planners and firms of Chartered Financial Planners have established links with other professional service providers.

Financial planning complements your advisory services and can be of mutual benefit in delivering a holistic professional advice service to clients whilst reinforcing long term high quality client relationships.

Some of the areas where legal advice meets financial advice are highlighted below:

### SOLICITOR

Trust & Estate Planning  
Long term care  
Corporate &  
Employee services  
Personal injury &  
Divorce settlements

CHARTERED  
FINANCIAL PLANNER

## Who grants, and polices, Chartered Financial Planner status?

The Personal Finance Society is the leading professional body for financial advisers. With over 34,000 members, we are part of the CII group, the world's leading provider of professional training, qualifications and thought leadership, to the insurance and financial services professions.

The CII has been at the forefront of setting professional standards for over a century and now has 112,000 members and affiliates in 150 countries. Both the CII and the Personal Finance Society are focused on engendering public confidence and trust in financial services by setting standards and increasing professionalism.

## Isn't it time you gave your clients access to Chartered financial advice?

You can find out more about Chartered financial advice here:  
[www.thepfs.org/professional-connection](http://www.thepfs.org/professional-connection)

# Now is a great time to explore the potential benefits of working in collaboration with a Chartered Financial Planner.

 @PFSconf  PFS Presidents Thinktank

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