



Personal
Finance
Society

Standards. Professionalism. Trust.

Financial advice you can trust

[thepfs.org](https://www.thepfs.org)

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. Members must:

- Act with the highest 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.

Members of the Personal Finance Society commit to several duties in relation to you and the wider community.

Protecting your interests

The Personal Finance Society requires all members to comply with its 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.

Providing trusted advice

Members commit to continuing professional development to keep their knowledge of the ever-changing financial planning profession current. When it comes to meeting your financial needs, you can expect appropriate advice, complete with relevant information and documentation.

Giving back

All members are expected to advance the reputation of the profession by making a positive contribution to society and their community. Practising such conscientiousness keeps trust at the heart of everything they do.

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.

Putting you first

Your financial planner has given you this leaflet to confirm that they are a 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 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)

Personal Finance Society 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.

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 Personal Finance Society

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