

Designation and Logo Guidelines

PFS

For CertPFS, DipPFS, APFS and FPFS members:

Through membership there are a number of benefits such as belonging to a professional body as well as the use of designatory letters – which can be advantageous to your career. Designatory letters on business stationery can be used to demonstrate your level of professionalism to respective clients.

A set of brand guidelines are in place to which all members must adhere with regards to the usage of our logos. As a member of the PFS (Personal Finance Society) you can use your designation as printed on your membership card. Designatory letters and the Personal Finance Society logo may only be used by current members of the Society, as follows:
Mr A.N. Adviser CertPFS

The logo may only be produced in one way:

1. Prefaced by the words:
(name) is a member of (logo)

In circumstances where Mr A. N. Adviser is the sole proprietor of the company, it must clearly state that ‘Mr A.N. Adviser CertPFS is a member of The Personal Finance Society’, as opposed to the company being a member of The Personal Finance Society. This distinction must be clearly made where the PFS logo is used. (See example of business card).

Membership to the PFS is only available to individuals. Thus an organisation cannot be a member of the PFS. It is not permitted to use the PFS logo on any corporate stationery/marketing material or corporate website. The Personal Finance Society reserves the right to withdraw the facility to use the logo if the guidelines are not complied with to the Society’s satisfaction. In such circumstances the decision made by the PFS is final.

Example of a business card



CII

The CII logo cannot be used on individual or corporate stationery. This is a long standing policy and relates to the ability of the CII to effectively endorse the activities of an individual CII member that displaying the logo would imply. The membership of the CII is extremely broad covering broking, underwriting, claims amongst many other disciplines and it is not possible to monitor these activities at an individual level. This is contrasted with the position in the Personal Finance Society where members are working in a defined and regulated area with an approved examination regime and subject to conditions from time to time, are permitted to display the PFS logo.

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Chartered title holders

Note where CII members are also Chartered title holders, those members are permitted to display the relevant Chartered Title logo, subject to conditions from time to time.

To support leading firms in the financial advice and insurance broking sectors, and to recognise their adherence to the highest standards of professional practice, the CII has secured agreement from the Privy Council to enable firms to call themselves 'Chartered Financial Planners'/'Chartered Insurance Brokers'.

This corporate Chartered status is of major significance. It reinforces the importance of professionalism in a fast-moving and competitive market.

It also helps place firms of advisers/brokers on a par with other professional practices, such as accountants and solicitors.

Financial advice/Insurance broking firms which meet the criteria laid down for Chartered status are eligible to use the title 'Chartered Financial Planners'/'Chartered Insurance Brokers' in their business dealings. A set of guidelines detailing how to apply the Chartered marque can be accessed by clicking here:

**[http://www.cii.co.uk/downloaddata/
CII_Corp_Chartered_Brand_Guidelines08.pdf](http://www.cii.co.uk/downloaddata/CII_Corp_Chartered_Brand_Guidelines08.pdf)**