

# PFS

**Members designation and logo guidelines**



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“ Just being honest  
is not enough.  
The essential  
ingredient is  
executive integrity. ”

Philip Crosby

### For CertPFS, DipPFS, APFS and FPFS members:

There are a range of benefits that come with membership of a professional body. Using designatory letters on your business stationery demonstrates your commitment to professional standards and highlights your qualifications to prospective clients.

A set of usage guidelines are in place to ensure that our logos are represented correctly. As 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:

Prefaced by the words:

(name) is a member by examination 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. This distinction must be clearly made where the PFS logo is used.

(See example of business card).

PFS membership is only available to individuals. Use the PFS logo is therefore restricted to individuals and cannot be reproduced in corporate stationery/ marketing material. The Personal Finance Society reserves the right to withdraw use the logo if the guidelines are not complied with to the Society's satisfaction.

The PFS is part of the CII, but appropriately qualified members are only entitled to display the CII logo as part of the Chartered marques. Guidelines for using the individual and corporate Chartered marques are included in this document.

### Example of a business card



## Other media

Where an individual's PFS membership is communicated through other media that does not solely relate to the individual, i.e. a personal profile within a corporate website, the logo should be clearly attributed to the individual holding the membership.

As detailed on the previous page, the logo may only be produced when prefaced by the words: (name) is a member by examination of (logo).

If a description of the PFS is required the following standard boilerplate should be used:

“The Personal Finance Society is the leading professional body for the UK financial planning profession. Its mission is to raise professional standards. The PFS is part of the CII, the leading professional body for the global financial services profession. The CII has been at the forefront of setting professional standards since receiving its Royal Charter more than a Century ago.”



**Even if you are the only member working in a firm, the PFS logo should be clearly attributed to you as an individual, rather than to the firm.**

The Chartered Financial Planner marque can be used by those that have achieved Chartered status. It may be used on business cards and other media, but care must be taken to clearly attribute it to the qualified individual member rather than a firm, product or service – see page 11.

The marque should be displayed in gold or black or the darkest colour in your corporate colour palette. Where the marque doesn't fit within your corporate branding or cannot be represented at the appropriate size, Chartered status can also be communicated as a text line – see page 6.

The text line can only be used instead of the marque – you should not use both the marque and the text line together.

### Dark background use



### White or light background use



### PMS 872 use



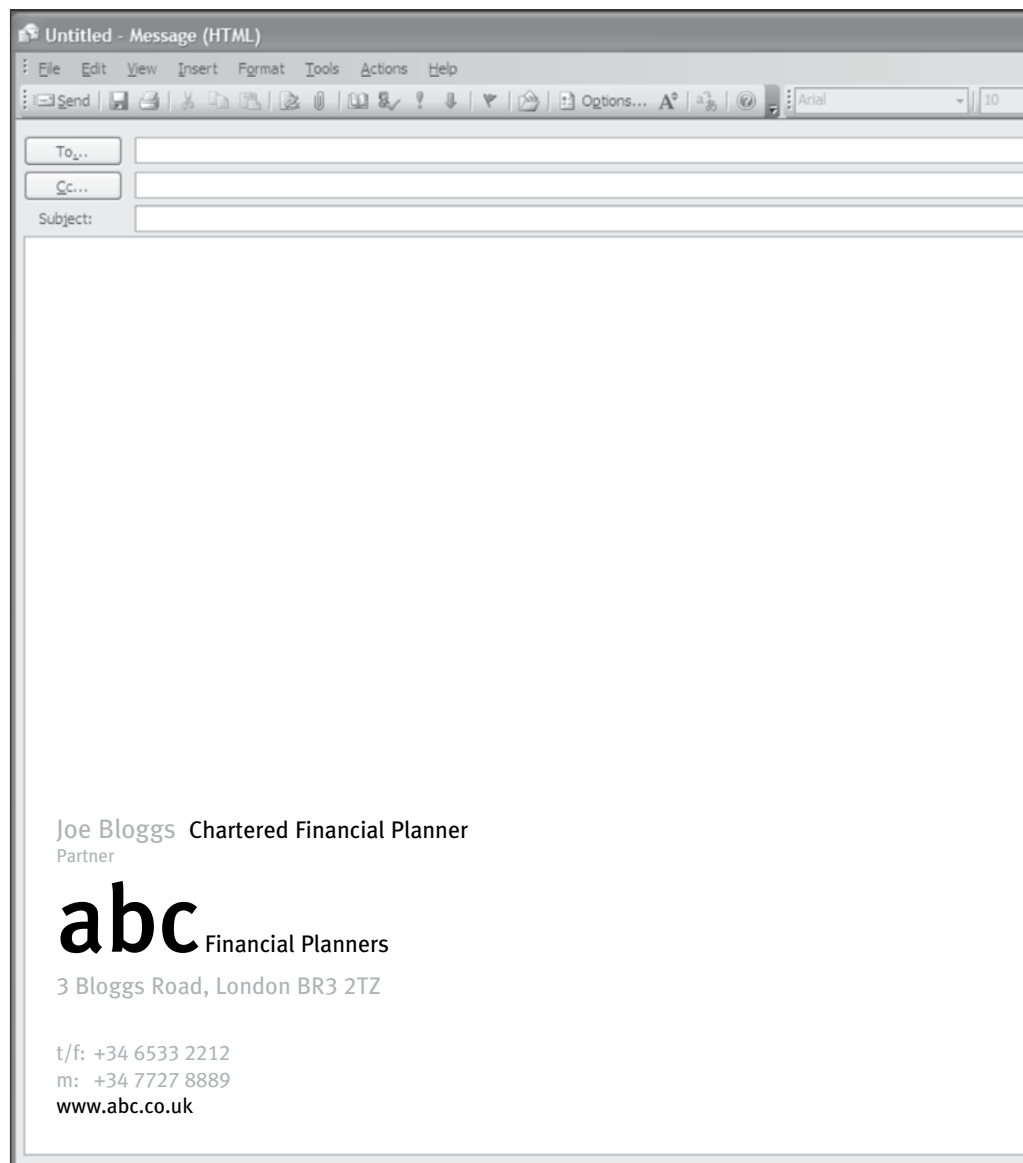
## Text line

The Chartered Financial Planner text line can be used as an alternative to displaying the Chartered Financial Planner marque. For example, the text line can be used with an email sign-off in cases where the marque cannot be used at an appropriate size. It can be used in your own corporate style, including colour, font, upper and lower case. Care should be taken not to use both corporate and individual Chartered marques together – see details on page 12.

## Using both individual and corporate marques

Communicating both corporate and individual Chartered status on a business card or other media should be done using a combination of a single marque together with the text line. Both corporate and individual Chartered logos should not be used together. If you display the corporate Chartered marque then the individual Chartered text line should be used. Alternatively, if you wish to display the individual Chartered marque then the corporate Chartered text line should be used. See examples on page 12 and refer to the corporate Chartered status guidelines for more information on the use of the corporate Chartered marque.

**NB.** It is the responsibility of Chartered firms to ensure that use of the corporate Chartered marque does not suggest that a non-Chartered employee has attained individual Chartered status.



## Correct use

Black on white



White on black



Dark colour on white



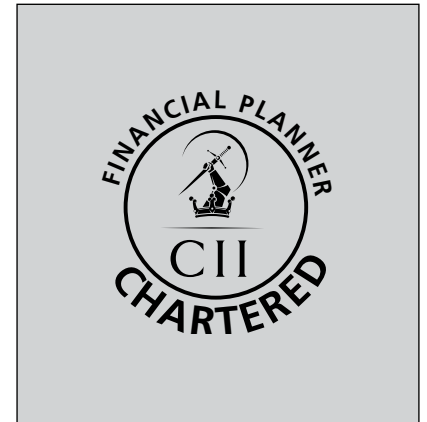
Gold PMS 872  
on white



White on dark  
background



Black on light colour  
background



## Incorrect use

Black on dark colour background



Appearing in a box



On top of an image or patterned background



A percentage tint of a solid colour



Enlarged section of logo



As a pale tint of a colour on white





Sizing

The size at which the marque will be displayed will vary depending how and on what it is being used.

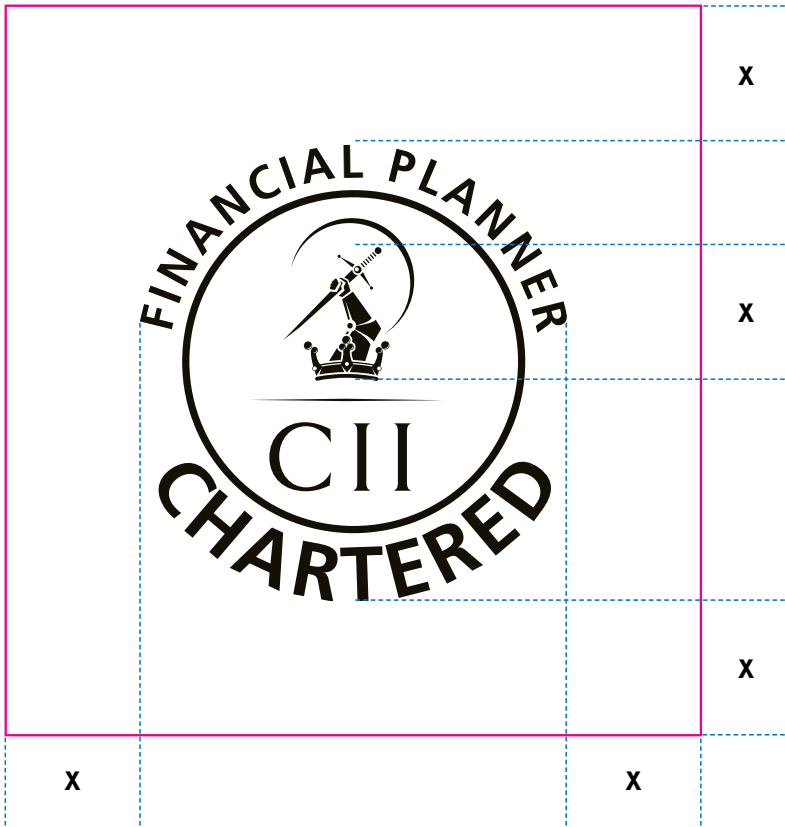
On most applications to ensure the marque stands out, a degree of free space around it is required. Do not place text or graphics in this free space.



The recommended minimum size at which the marque should appear is 23mm\*

\*This may not be possible when including the marque on your business stationery or for email sign-offs, where it may need to appear slightly smaller. Every effort should be made to ensure the logo remains legible – where this is not possible, the text line should be used as an alternative (page 6).

Space around logo



X = the height of the arm and sword within the logo

## Business cards

The instructions in this section are applicable to all individual Chartered title marques.

In the main, individual status will be used on business cards as shown here.

For any other usage requirements for this marque, please contact the CII marketing team on 020 7417 4446.



The marque can be printed in gold, black or the darkest colour within your corporate palette on white or reversed out of a dark colour.



Where a text line is used as above it can be in your company's own corporate font so that it fits with your branding.



As shown, the marque can appear on the front or reverse of the card.

**Individual and corporate Chartered marques must not be used together.**

## Other media

Where an individual's Chartered status needs to be communicated through other media that does not solely relate to the individual, for instance through a corporate website, the marque should be clearly attributed to the individual holding the title.



**Even if you are the only adviser working in a firm, the individual Chartered marque should be clearly attributed to you as an individual, rather than to the firm.**

## Using both individual and corporate marques

The instructions in this section are applicable to all Chartered title marques, both individual and corporate.

When you need to communicate on a business card both corporate and individual Chartered status a combination of text line and marque should be used, depending on the emphasis you wish to give. If you display the corporate Chartered marque then the individual Chartered text line should be used. Alternatively, if you wish to display the individual Chartered marque then the corporate Chartered text line should be used. Detailed here are some examples of this.

Refer to the corporate Chartered status instructions for more information on the use of the corporate Chartered marque.



The individual marque can be printed in gold, black or the darkest colour within your corporate palette on white or reversed out of a dark colour.



Where text lines are used as above it can be in your company's own corporate font so that it fits with your branding. You can have both titles in text.



You can only show one marque either on the face or reverse of the card. However, when communicating both corporate and individual Chartered status you could show the individual marque on the face and the corporate marque on the reverse of the card.