

Personal Finance Society

Members designation and logo guidelines

Contents

Personal Finance Society

For CertPFS, DipPFS, APFS and FPFS members3

Other media4

Individual Chartered marques

The marques5

Text line6

Correct use.....7

Incorrect use8

Sizing.....9

Using Individual Chartered marques

Business cards.....10

Other media11

Using individual and corporate marques

Business cards.....12



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 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:

A member of the (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).

Personal Finance Society membership is only available to individuals. Use of 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 Personal Finance Society is part of the CII, but appropriately qualified members are only entitled to display the CII logo as part of the Chartered marque. 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 Personal Finance Society 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 of the (logo).

If a description of the Personal Finance Society 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 Personal Finance Society 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



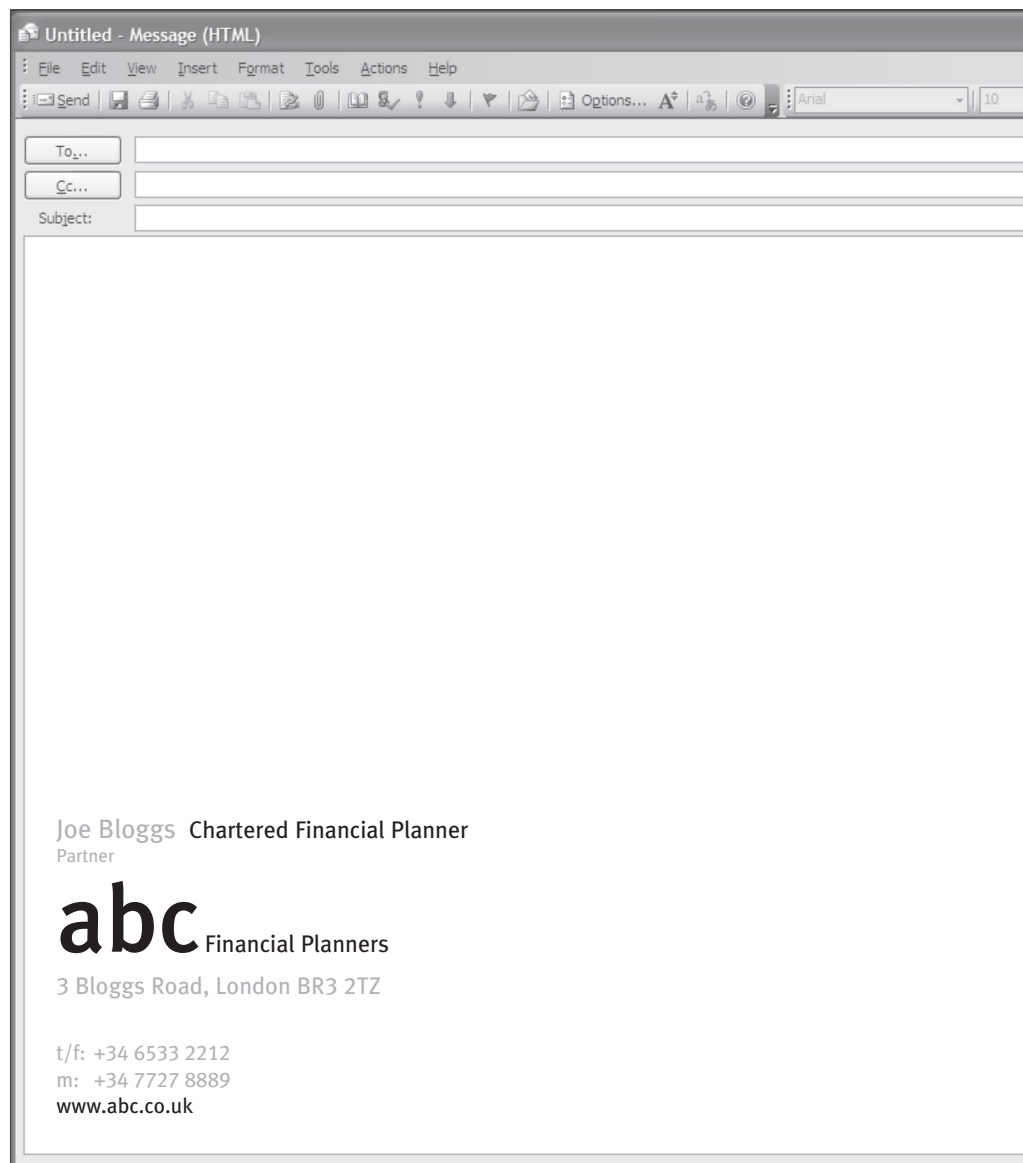
Text line

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.

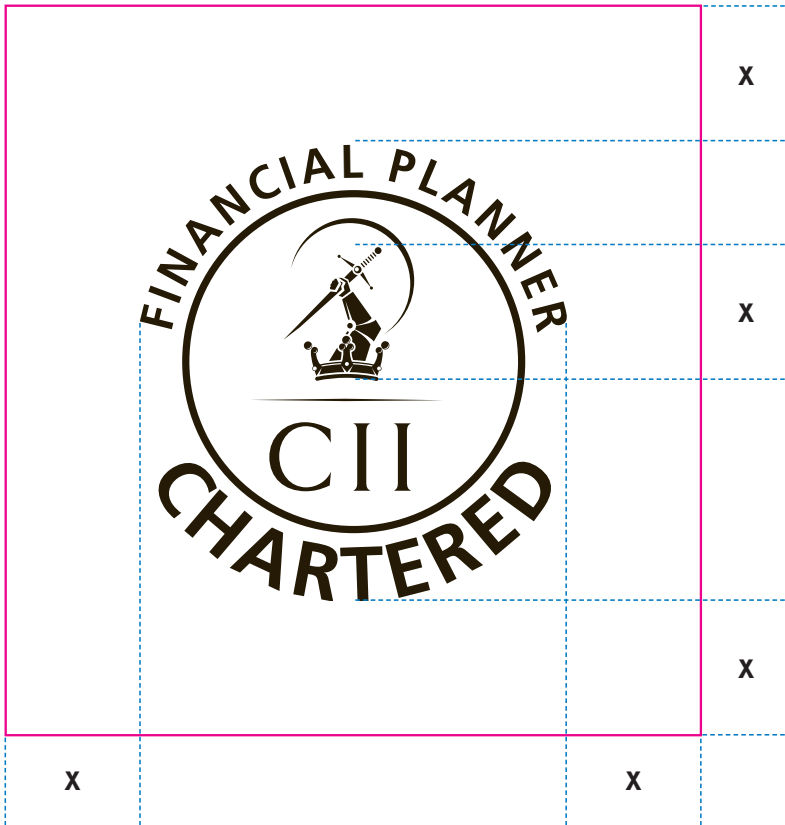
On most applications to ensure the marque stands out, a degree of free space around it is required. Do not place text or graphics in this free space.



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 PFS marketing team on 020 7417 4469.



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.

The CCC logo

The Consumer Confidence Campaign is an independent initiative to demonstrate to the public that the industry is united in its determination to build public trust in the profession.

Use of the campaign logo seeks to affirm that you are working to change consumer perceptions and build awareness and trust in the financial advice profession..

There are three versions of the logo:

Primary (Colour) logo

Use the colour version of this logo wherever you can. And apply it on white backgrounds.



Black and white logo

This version of the logo in solid black is used whenever applying the logo if colour isn't possible or cost-effective. This version appears only on white or tonally very light backgrounds.



White logo

The white logo is used in specific instances where use of the CCC primary logo would not be legible.



Reversed out logo

This version of the logo in reversed out solid black is used whenever applying the logo if colour isn't possible or cost-effective. This version appears only where the black and white logo would not be legible.



How to position the logo

Where and how you position the logo has a significant effect. So following these principles will maximise its impact:

- Wherever possible, position the logo in the bottom left hand corner.
- We use the logo on its own as it's strong enough to stand by itself.
- We keep an exclusion zone around it and don't let text, imagery or patterned backgrounds enter its space and hamper legibility.
- We don't use the logo on internal pages (to avoid over branding).

Logo sizes

A4 cover	xxmm
A5 cover	xxmm
Letterhead	xxmm
Compliment slip	xxmm
Business card	xxmm
Forms)	xxmm
A4 Information sheets	xxmm
A5 Information sheets	xxmm
Business stationery	xxmm

Logo clear space exclusion zone



Measuring the logo



Minimum logo size



How to choose a logo background

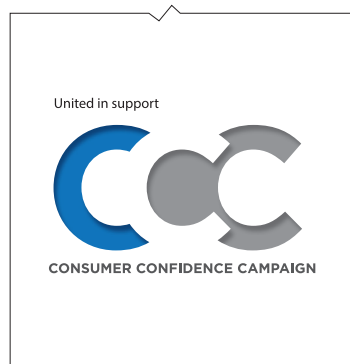
So that it's always recognisable, there are specific ways in which the CCC logo can and can't be used. The guide on this page shows how each version of the logo requires a specific background.

Remember: we never position the logo over an area with patterns, lines or other visual features that may distract and confuse its appearance.

And the logo should never be used as an abstract shape or as a tinted background or pattern.

Colour logo

This logo can appear only on a white background.



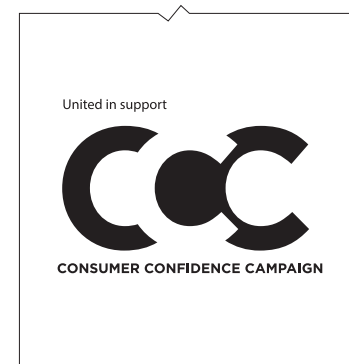
White logo

The white logo should appear on dark colours or backgrounds.



Black and white logo

The black and white logo appears only on a white or very light background.



Reversed out logo

The reversed out logo appears only on a white or black background.



How not to use the logo

When inconsistencies begin to creep into the way an organisation applies its identity, little errors can soon build into big issues. People may fail to recognise communications, or we may seem unprofessional or disjointed.

So using the elements of our identity correctly each time – especially the CCC – is vitally important.

Here are a few examples of ways in which the logo can be misused and reasons why these executions are off-brand.

Colour logo



The logo should appear in its original colours

White logo



Graduated backgrounds shouldn't be used

Black and white logo



We never use the logo as a watermark or a ghosted image. It always appears as 100% strength black

Reversed out logo



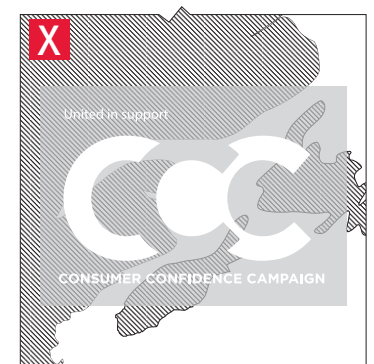
Background impairs legibility of the logo



Background impairs legibility of the logo



Background impairs legibility of the logo



Background impairs legibility of the logo