

Associate Firm: Personal Finance Society

Guidelines for mark usage



Contents

1.0 Associate Firm mark

1.1	Standard size Associate Firm mark	4
1.2	Reduced size Associate Firm mark	6
1.3	Text line	8

2.0 Associate Firm mark usage

2.1	Standard mark	10
2.2	Minimum mark	11

3.0 Mark examples

3.1	Using Associate Firm Mark and text line	13
3.2	Using Associate Firm on premises	16

4.0 Using Associate Firm with Chartered mark

4.1	Using Associate Firm Mark with individual Chartered status	17
4.2	Using Associate Firm Mark with corporate Chartered status	18

Associate Firm mark

Associate Firm mark from Personal Finance Society

On successful application as an Associate Firm you become eligible to display the mark, in accordance with the term and conditions. Displaying the Associate Firm mark publicly aligns your firm with professional standards and demonstrates your commitment to uphold the 8 core principals of being an associate firm:

The 8 Core principles of being an Associate Firm:

1. Act in the best interests of clients, using a customer charter to aid transparency;
 2. Demonstrate integrity, probity and fairness by aligning with the code of professional ethics & conduct;
 3. Comply with the spirit as well as rules of regulation;
 4. Comply with the spirit as well as the rules of employment law;
 5. Invest in your people by funding a policy of ongoing training & professional development
 6. Operate a clear diversity & inclusion policy, for both your staff & clients;
 7. Operate a policy of corporate social responsibility; and
 8. Adhere to transparent governance standards and processes.
-

1.1 Associate Firm: Personal Finance Society | Standard size mark

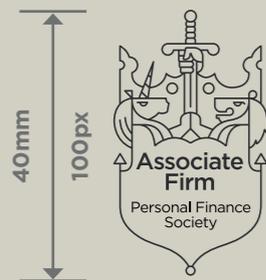
Associate Firms are eligible to display the mark on their marketing collateral. Please see page 10 for usage dimensions.

The Associate Firm mark in dark grey (PMS 426, CMYK 95/75/55/95 and RGB 51/51/51) is the preferred version. However, there is also one other colour variation to choose from which may better align with your organisation's brand identity. Either of the two colour variations are acceptable to use.

It is important that the Associate Firm mark is not reproduced too small - it must remain legible and clear at all times.

Please do not use the Standard size Associate Firm mark any smaller than 40mm in height for print or 100px for digital applications.

Associate Firm mark - Standard size Primary colour Dark grey version



1.1 Associate Firm: Personal Finance Society | Standard size mark

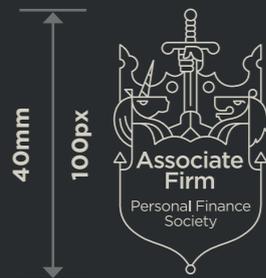
Associate Firms are eligible to display the mark on their marketing collateral. Please see page 10 for usage dimensions

This is the Associate Firm mark in Off-white (PMS 7527, CMYK 5/5/15/10 and RGB 214/210/196).

It is important that the Associate Firm mark is not reproduced too small - it must remain legible and clear at all times.

Please do not use the Standard size Associate Firm mark any smaller than 40mm in height for print or 100px for digital applications.

Associate Firm mark - Standard size Single colour Off-white version

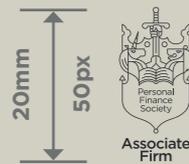


1.2 Associate Firm: Personal Finance Society | Reduced size mark

When the Associate Firm standard mark cannot be used (for example, on a business card) please use the Reduced size Associate Firm mark as shown below, which has been designed to cater for such eventualities.

Do not use the minimum mark any smaller than 20mm in height. See page 11 for more information.

Associate Firm mark - Reduced size Primary colour Dark grey version



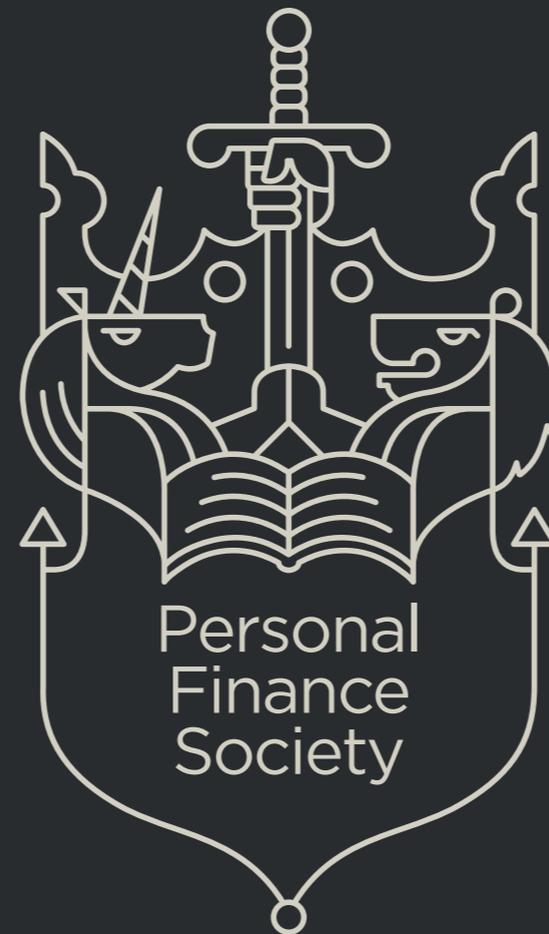
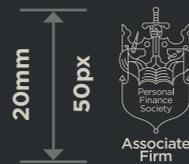
**Associate
Firm**

1.2 Associate Firm: Personal Finance Society | Reduced size mark

When the Associate Firm standard mark cannot be used (for example, on a business card) please use the Reduced size Associate Firm mark as shown below, which has been designed to cater for such eventualities.

Do not use the minimum mark any smaller than 20mm in height. See page 11 for more information.

Associate Firm mark – Reduced size Single colour Off-white version



**Associate
Firm**

In the event that neither the standard, nor reduced size Associate Firm mark can be used, you can opt to use the text line **in place** of the mark.

Associate Firm text line

The use of the Associate Firm mark is preferable to communicate your Associate Firm status however where this is not possible you can use the Associate Firm text line:

Associate Firm: Personal Finance Society

The Associate Firm text line can be used in your own corporate style; this includes colour, font, upper and lower case.

It is important that where the text line is used, it does not imply that the title is part of the organisation's legal name as the use of "Associate Firm" as part of an entity name is not permitted.

Associate Firm: Personal Finance Society

Associate Firm mark usage

2.1 Associate Firm: Personal Finance Society | mark usage | Standard size

It is important to leave plenty of clear space around the Associate Firm mark.

This helps it stand out and ensure that any secondary material does not undermine its authority.

The Associate Firm mark has a recommended area of clear space around it to prevent any secondary material affecting its legibility. This area should be left clear of type, images, shapes and other marks.

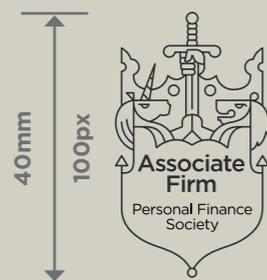
This has been defined as X which is the space from the edge of the crown to the centre of the line in the sword.

Exclusion zones should be maintained each time the Associate Firm mark is used, including on photographic backgrounds, where an appropriate area of clarity within the image should be used.

Minimum height for the Standard size Associate Firm mark

It is important that the Associate Firm mark is not reproduced too small - it must remain legible and clear at all times.

Please do not use the Standard size Associate Firmmark any smaller than 40mm in height for print or 100px for digital applications.



Colour

- The preferred mark is designed to appear in 1 colour Dark grey (PMS 426, CMYK 95/75/55/95 and RGB 51/51/51) on light backgrounds.
- If this is not possible, use off-white version (PMS 7527, CMYK 5/5/15/10 and RGB 214/210/196) on dark backgrounds.



2.2 Associate Firm: Personal Finance Society | mark usage | Reduced size

It is important to leave plenty of clear space around the Associate Firm mark.

This helps it stand out and ensure that any secondary material does not undermine its authority.

The Associate Firm mark has a recommended area of clear space around it to prevent any secondary material affecting its legibility. This area should be left clear of type, images, shapes and other marks.

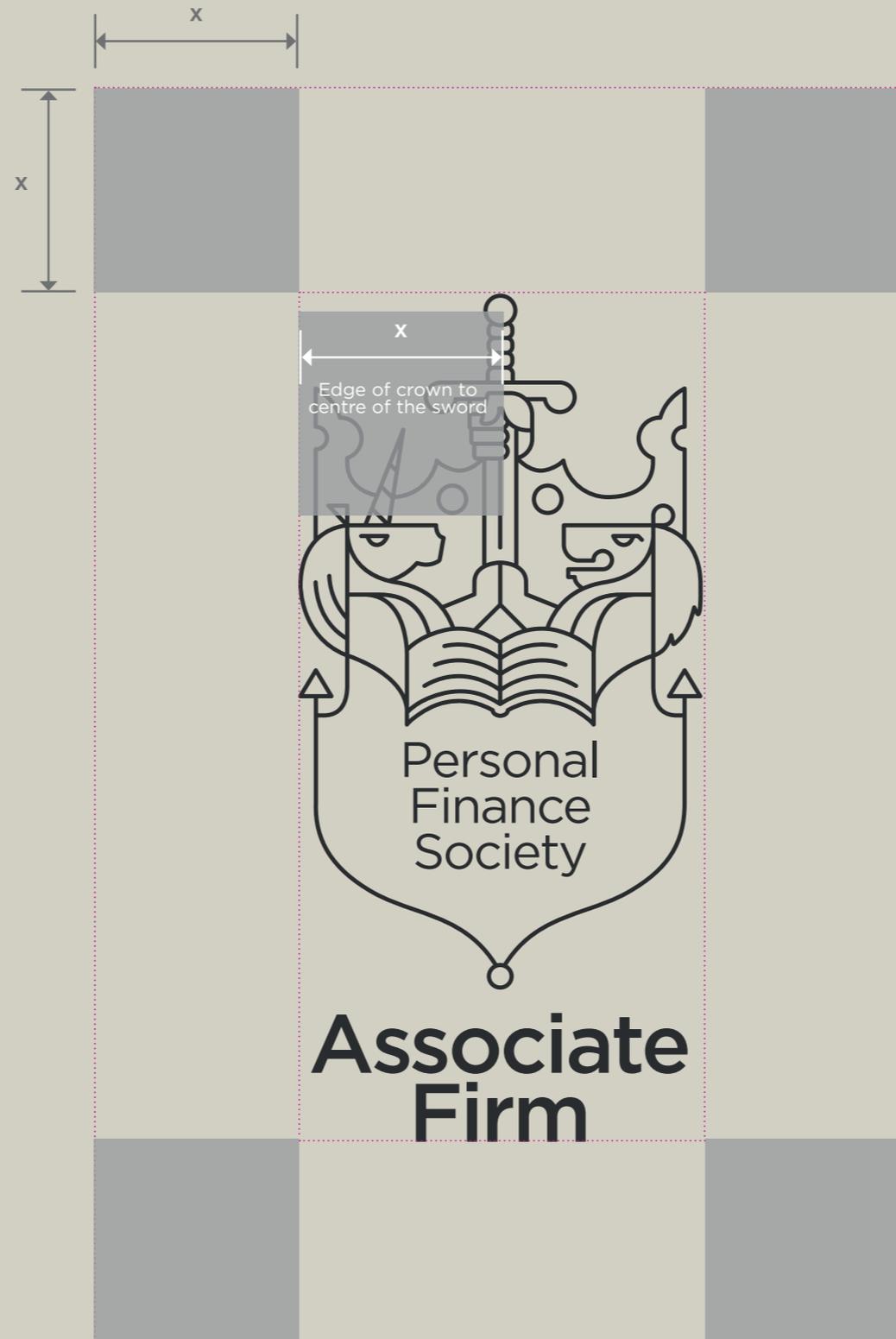
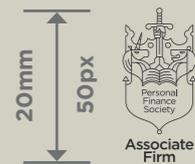
This has been defined as X which is the space from the edge of the crown to the centre of the line in the sword.

Exclusion zones should be maintained each time the Associate Firm mark is used, including on photographic backgrounds, where an appropriate area of clarity within the image should be used.

Minimum height for the Reduced size Associate Firm mark

It is important that the Associate Firm mark is not reproduced too small – it must remain legible and clear at all times.

Please do not use the Reduced size Associate Firmmark any smaller than 20mm in height for print or 50px for digital applications.



Colour

- The preferred mark is designed to appear in 1 colour Dark grey (PMS 426, CMYK 95/75/55/95 and RGB 51/51/51) on light backgrounds.
- If this is not possible, use off-white version Off-white version (PMS 7527, CMYK 5/5/15/10 and RGB 214/210/196) on dark backgrounds.



Associate Firm mark examples

3.1 Associate Firm: Personal Finance Society | Mark examples

Using the Associate Firm mark

In the main, the Associate Firm mark will be used on your organisation's marketing collateral:

- Use the mark to communicate your firm's acceptance as an Associate Firm
- It is preferred for the Associate Firm mark to be displayed in Dark grey where possible. However, any of the two colour variations are acceptable to use
- If it is not possible to use the Associate Firm mark then use the Associate Firm text line.

Business cards



Associate Firm mark



Associate Firm text line when it's not possible to use the mark

3.1 Associate Firm: Personal Finance Society | Mark examples

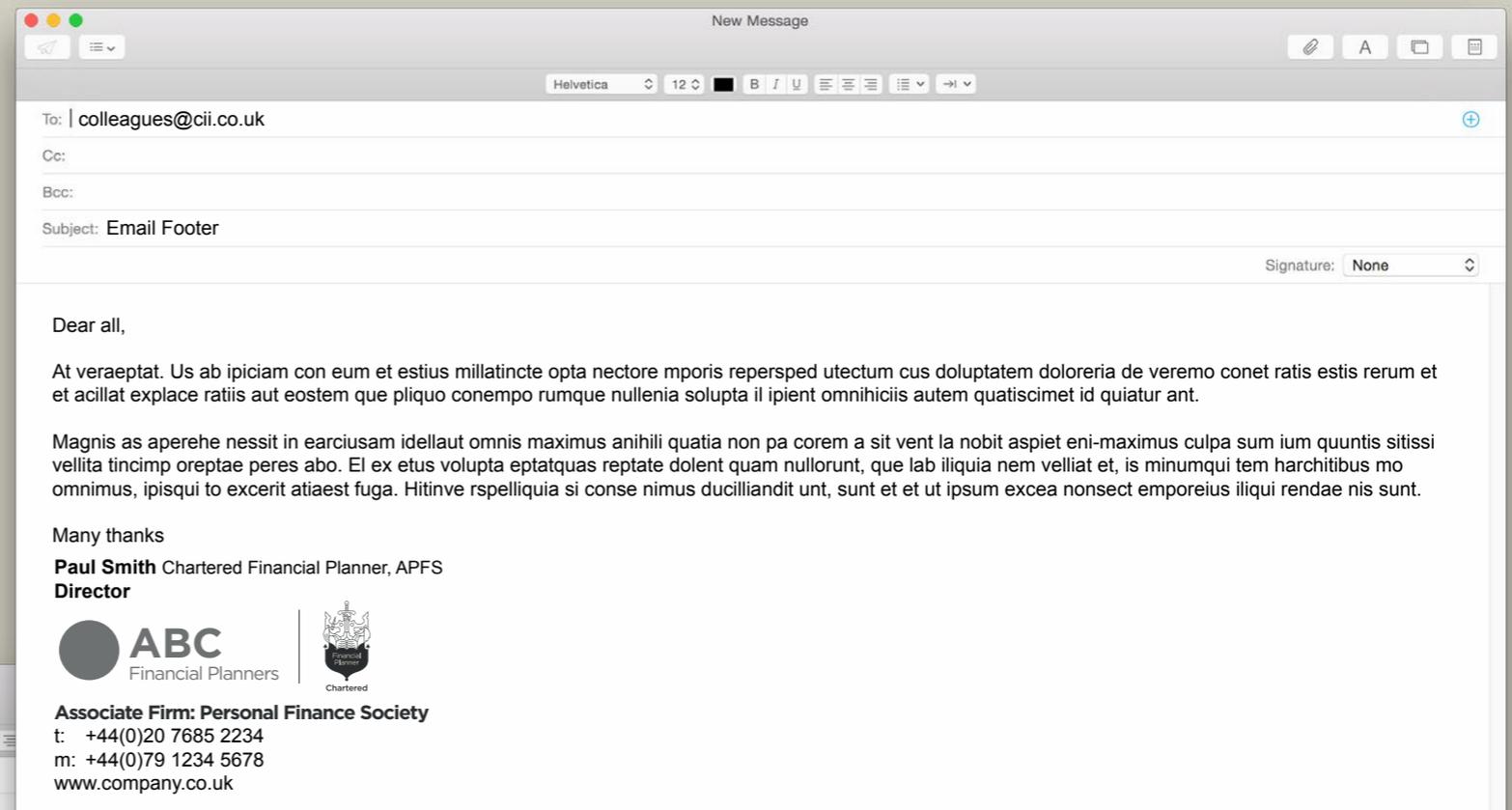
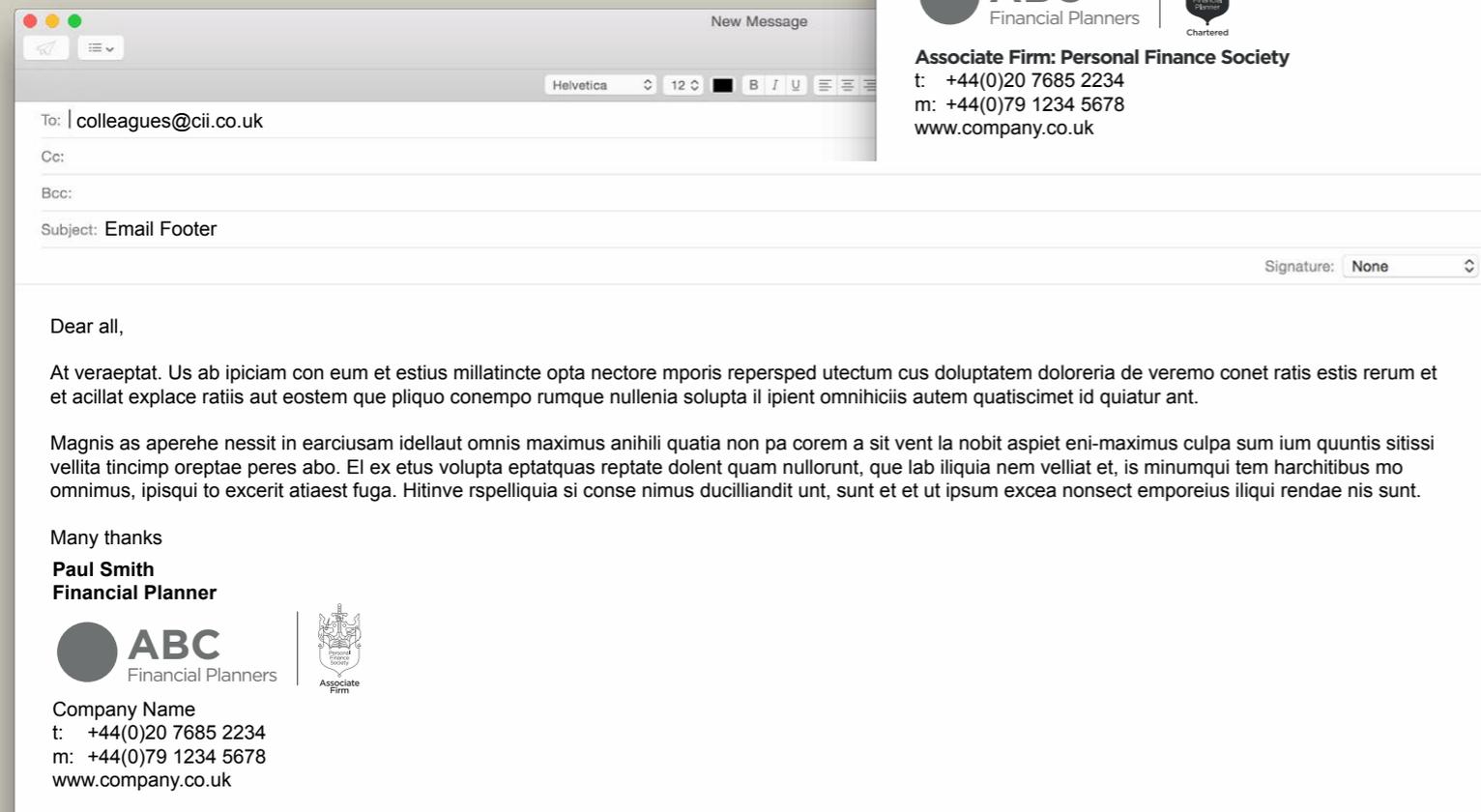
Using the Associate Firm mark

In the main, the Associate Firm mark will be used on your organisation's marketing collateral:

- Use the Associate Firm mark to communicate your firm's acceptance as an Associate Firm
- It is preferred for the Associate Firm mark to be displayed in Dark grey where possible. However, any of the two colour variations are acceptable to use
- If it is not possible to use the Associate Firm mark then use the Associate Firm text line.

Email signature

Below: Using the Associate Firm mark



Above: Associate Firm text line when it's not possible to use the mark

3.1 Associate Firm: Personal Finance Society | Mark examples

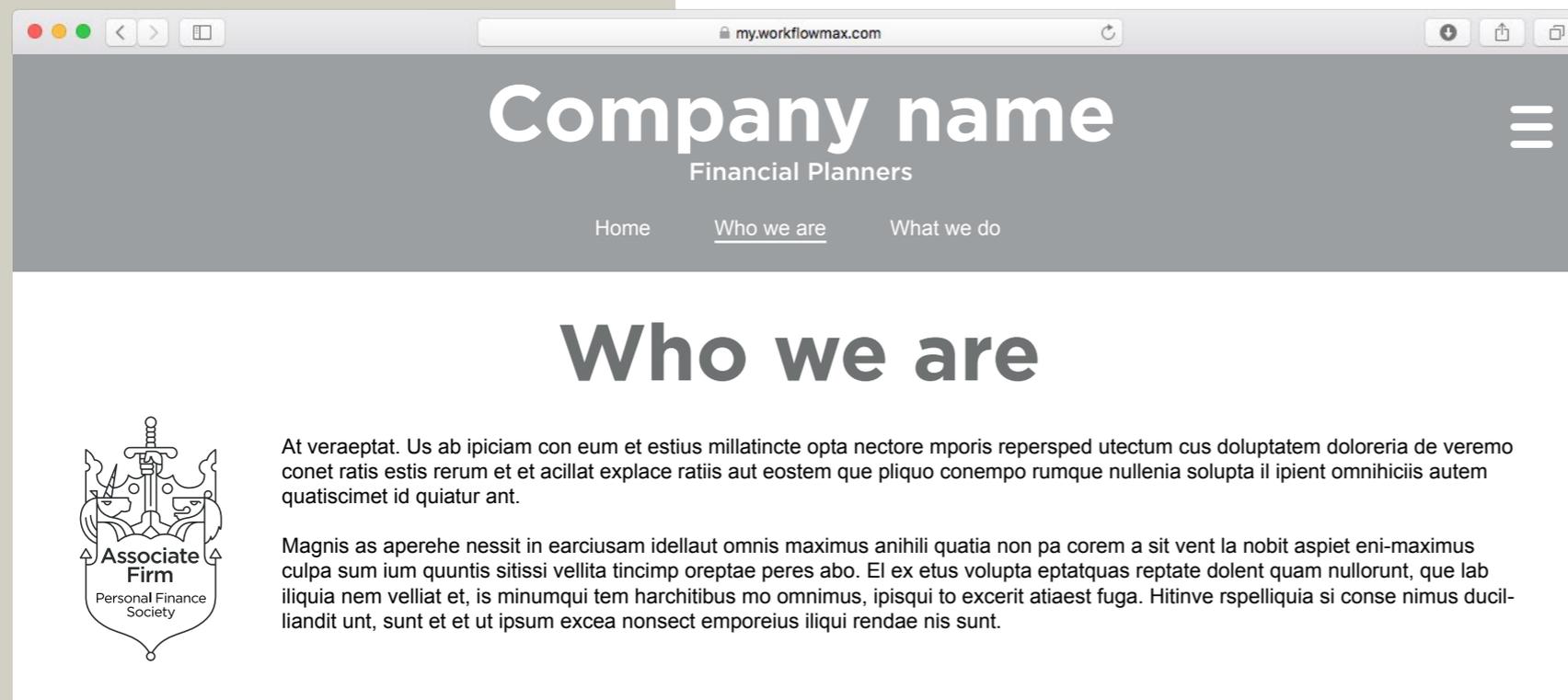
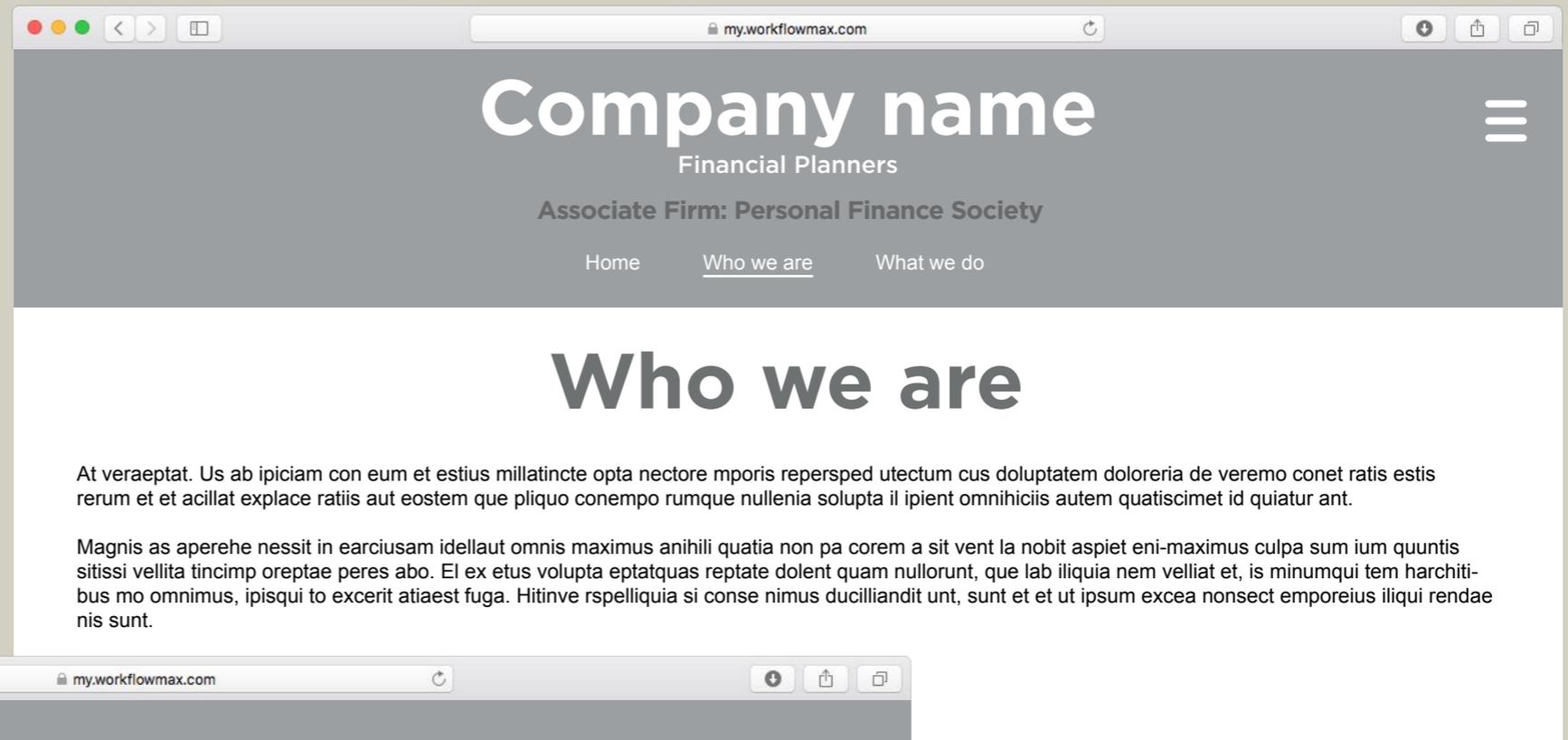
Using the Associate Firm mark

In the main, the Associate Firm mark will be used on your organisation's marketing collateral:

- Use the mark to communicate your firm's acceptance as an Associate Firm
- It is preferred for the Associate Firm mark to be displayed in Dark grey where possible. However, any of the two colour variations are acceptable to use
- If it is not possible to use the Associate Firm mark then use the Associate Firm text line.

Web page

Below: Using the Associate Firm mark



Above: Associate Firm text line when it's not possible to use the mark

Using the Associate Firm mark on office premises

- Use the mark to communicate your firm's acceptance as an Associate Firm at your office premises by displaying the plaque provided in a prominent place in your office such as the reception area.
-



Using Associate Firm with Chartered mark

4.1 Using Associate Firm with individual Chartered status | Guidance

Should you want to communicate on a business card both Associate Firm and individual Chartered status, a combination of text line and Chartered mark must be used, depending on the emphasis you wish to give.

The options shown opposite show the combinations that can be used.

- Use a combination of Associate Firm mark and individual Chartered status text line.
- Use a combination individual Chartered status mark and Associate Firm text line.

Business cards



Associate Firm mark & individual Chartered status text line



Associate Firm text line & individual Chartered status mark

4.1 Using Associate Firm with Chartered mark | Guidance

If your firm has both corporate Chartered and Associate firm status, you should choose to use either the Associate Firm or Chartered mark as it is not permitted to display both marks together. We would recommend displaying the Chartered mark in this instance given its recognition in the public arena.

You could, however, opt to use the text line for the firm's status that hasn't been displayed as a mark.

If it were to be the case that the firm had both statuses and the individual was also Chartered, then the individual would be unable to use the individual Chartered logo - they would be limited to using the text line only to convey their individual Chartered status.

Business cards



If a firm holds both statuses the recommendation is to use the corporate Chartered mark with Associate Firm text line.

If an individual is also Chartered then this must be displayed as a text line.

5.0 Contact

If you have any questions about the Personal Finance Society brand or need to request any of our brand assets, please get in touch with our Customer Service team

thepfs.org

Contact

Personal Finance Society is part of the Chartered Insurance Institute Group.

Registered office:
21 Lombard Street
London
EC3V 9AH
tel: +44 (0)20 8530 0852

customer.serv@thepfs.org

thepfs.org

 [@pfsconf](https://twitter.com/pfsconf)

© Personal Finance Society 2020