

FACTS & FIGURES

AMONGST FIRST TO ACHIEVE CHARTERED STATUS



Following Pam Webster's success in the October 2007 examination round which saw her become a fully fledged Chartered Financial Planner, the Chartered Insurance Institute (CII) has awarded Facts & Figures the prestigious 'Chartered Financial Planners' title. Chartered status is an exclusive title only awarded to firms which meet rigorous criteria relating to professionalism and capability. All Chartered Financial Planner firms

commit to the CII's Code of Ethics & Conduct reinforcing the highest standards of professional practice in their business dealings.



Simon Webster, managing director, says that securing Chartered Financial Planner status is a huge landmark for the company: "To date, of nearly 6,000 firms nationally, less than 100 have achieved Chartered status, indicating that this really is a highly exclusive award reserved for only the leading firms within the financial advice market. So I am delighted for Pam that all her hard work and study have paid off so handsomely and I am delighted for the firm in that while we have always prided ourselves on being thoroughly professional in everything we do, receiving external recognition in this way is still very gratifying indeed. As Chartered Financial Planners we signal our commitment to the highest levels of professionalism and customer service.

We are sure that over time chartered financial planning firms will become recognised as the elite professionals of the financial services industry, and that we are now well positioned to continue providing financial leadership and trusted advice to our clients.

We are looking to grow the business over the next few years and we believe the award of this title will both encourage new business and, other advisers to want to develop their skills as part of our team."

Facts & Figures specialises in providing advice on all types of investment; pensions; life assurance & healthcare, both for individuals and businesses, as well as being employee benefits consultants & mortgage brokers.

FINANCIAL BULLETIN

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Facts & Figures

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