

Increase your professional standing with ISO 22222

ISO 22222:2005 Personal financial planning — Requirements for personal financial planners is the only international quality standard for providing personal financial planning

One of the major issues reported by consumers when seeking financial advice is the uncertainty over whether they can trust their financial planner. With a vast number of financial advisers and planners to choose from, consumers are often confused about where to turn for advice on planning for their financial future.

ISO 22222 increases consumer confidence by providing an internationally recognised benchmark for a high global standard of service. The standard covers the ethical behaviour, competencies and experience required by a financial planner while enhancing the transparency and efficiency of the processes surrounding personal financial planning.

At the core of ISO 22222 are the six steps of the personal financial planning process:

1. Establishing and defining the client and personal financial planner relationship
2. Gathering client data and determining goals and expectations
3. Analysing and evaluating the client's financial status
4. Developing and presenting the financial plan
5. Implementing the financial planning recommendations
6. Monitoring the financial plan and the financial planning relationship

Aligned to these key steps are the business-critical elements of business continuity, information security, client confidentiality and continual improvement, all of which help financial planning professionals to operate in a global best practice manner.

Benefits to you as a financial planner

- Improved sales and marketing opportunities
- Recognition from the consumer group Which?
- Improved performance
- Simplified and effective processes and documentation
- Standardisation of good working practices
- Improved communication between you and your team
- Promotion of an awareness of quality and better public awareness and public image leading to potentially reduced insurance costs
- Improved compliance, because the standard supports regulatory requirements

Benefits to your clients

- A more professional and consistent service
- Value added to the services they receive from their financial planner
- Assurance of quality of service
- Evidence of commitment to continual improvement and compliance through independent third party certification
- Reassurance that regulatory requirements are being adhered to and monitored on an ongoing basis
- Access to evidence of qualifications, experience and competency



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"Amazing how this has helped to raise the standard of our internal processes."

Helen West,
**West Financial
Management Co Ltd**



Certification is simpler than you think – we will support you through the whole process



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The ISO 22222 certification process

Once we have understood you and your requirements we will **create a personalised best practice certification proposal** which will include the following elements:

- A printed and bound copy of ISO 22222
- Best Practice Training™
- Gap analysis and document review
- Assessment conducted by one of our independent assessors
- Process improvement report outlining opportunities for further development

ISO 22222 certification: the cost

Prices start from £975*

*Plus VAT and expenses.

By adopting and maintaining the ISO 22222 requirements and recommendations, you will be able to demonstrate a continued and high-level commitment to an international standard benchmark of best practice.

About Standards International

We specialise in the promotion, training, pre-assessment, assessment and continuing certification for BS 8577 and ISO 22222. We are leading the way in pioneering and establishing global best practice standards in financial services.

We believe in the value of raising the quality and level of professionalism within financial services. We aim to support financial planners and their firms in delivering continuous service excellence to their clients and, as a result, developing a sustainable business and future for all.

Standards International provides a unique offering. We have unrivalled knowledge of and expertise in best practice standards of operation, gained from years of experience in helping financial planners and firms to operate more efficiently.

To join the unique group of ISO 22222 certified planners, please email us at enquiries@standardsinternational.co.uk or call us on 01462 790 894 for further information.

"For me, it's an endorsement that clients like.... It's a third party assessment of our processes and gives comfort we aren't going to leave anything uncovered."

Andrew Reeves,
The Investment Coach Ltd



Andrew Reeves,
The Investment Coach Ltd

"I would recommend attaining this internationally recognised award to stand out from the crowd."

Darron Whitehead,
Utopia Group

Changing the world **one** financial adviser at a time!

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