

Adviser Profile

Keith Churchouse of Chapters Financial Planning Limited - ISO 22222 Certification

Chapters Financial Planning Limited are Surrey-based Independent Financial Advisers (IFA) and Chartered Financial Planners, offering bespoke financial planning and advice for both individuals, businesses and charitable trusts. Established in 2004, they became the 15th Chartered Financial Planning company in the UK (2007).

Specialising in the whole spectrum of financial planning they provide both fee and commission based propositions in areas such as pension and retirement planning, self invested personal pensions (SIPPs), investments, tax and inheritance tax planning.

An expert in his field, Keith often features regularly in the media in particular on the BBC Southern Counties 'Mark Carter drive time' show on Thursdays offering information on the economic climate and its effects.



In order to continue with his drive for professional excellence, it was a natural choice to work towards the ISO certification. Keith believes that the ISO certification will inspire additional confidence in both his new and existing clients, due to them knowing that their financial planner has exceeded the required standards in ethical behaviour, competences and experience required to achieve the independent accolade that certification of ISO 22222 offers.

"It is all too easy to study for exams, pass them and then fall behind with the changing legislation and economic climate. By achieving the ISO standard, you are assessed initially and then annually so standards are confirmed and then not allowed to slip. Vital in the world of Treating Customers Fairly (TCF)."

A client's financial planning needs are always evolving, and confidence that their services have been benchmarked against the international standard was the driving factor behind Keith's decision to work towards certification. As the fourth financial planner in the UK to be certified by Standards International, he knows that rewards shall come in abundance, received not only by him but also by his clients, professional contacts and enquirers.

Their aim is to drive their Chartered company into the future and to encourage all advisers to achieve the ISO 22222 certification to improve standards across the profession.



"It was fantastic to see Keith's passion for being professional in everything he does. To work with such a well respected and well known financial planner, was a true honour for us and we are thrilled to have had him on our scheme"

Michelle Hoskin, director of Standards International

If you would like to find out more information about ISO 22222 or would like to find out more about the benefits of a achieving certification please contact:

Michelle Hoskin on t: 01462 790 894 or e: enquiries@standardsinternational.co.uk