

Adviser Profile

Ian Green – on ISO 22222 Certification

“For a number of years I was of the opinion that whilst my ‘CPD’ was second to none, I needed to improve my qualification levels. Fitting that in with the rest of life, as a businessman, husband and father was a challenge and I had procrastinated for a while. Then in 2008 I determined I would achieve Diploma level having last passed exams when completing my FPC in 1995.

So I sat down, worked out a timetable, picked my subjects and purchased the materials, successfully gaining the qualification in October 2008.

Whilst undertaking the ‘technical stuff’ I continued to improve my business and client services. I noticed that whilst learning ‘the investment theory’, the credit crunch was simultaneously proving much of it just that, theory only, and that in ‘real life’ very different things were happening. Likewise, as soon as I had learned a tax calculation, the powers that be were ‘U-turning’ and rendering my tax tables obsolete!

Given my earlier comments on CPD and that I had been fee based (indeed almost exclusively fee charging) since just after the turn of the millennium it occurred to me that as well as external validation of my knowledge through examination there would be value in external validation of my services and standards. It was this that brought me to the ISO 22222.

Despite being confident of the quality and level of service I offered I opted to undertake a gap analysis exercise. Whilst the elements it showed were missing were minor and few, the exercise proved immensely valuable as I am a great believer that it is the small differences that can make the big difference. Having amended where needed and added as required, I was delighted to subsequently receive my certification and now proudly display the mark on my client facing literature.

Whilst it is true that many, if not most, clients do not know specifically what ISO 22222 is, it is true that almost all clients understand what an ISO mark stands for in concept, having seen it on manufactured goods or as a company mark (e.g. ISO9001) so the fact that I have one in Personal Financial Planning means a great deal.

I wholeheartedly recommend the ISO 22222 process to any personal financial planner wishing to demonstrate to clients their quality of service and I equally endorse Michelle and her team at Standards International as a means of certification”

Ian Green

And here is what we have to say!

Over the last few years there has and continues to be a great deal of pressure put on financial advisers to not only increase their own technical knowledge but to also increase their professional standards.

For some the road map to achieving these two things is clear but for others it can be a challenging minefield.

As the UK’s leading ISO 22222 Certification body, we truly believe that professionalism comes only when an adviser has the right knowledge, the right application skills, sound ethical principles and a desire to embed continual improvement as a business standard.



For some financial advisers, qualifications are the be all and end all of their professional development, but for others the realisation that it is so much more than that will, we believe, change the face of the financial services profession forever.

A fantastic example of an adviser's plight to be a true professional is Ian Green.

At a time when he was already working towards his diploma, having the right level of technical knowledge was a key component of Ian's personal development; but it was Ian's desire to increase his professional standards that prompted him to begin the journey towards achieving the ISO 22222 certification.

Whilst well on his way to achieving his diploma, Ian had his ISO 22222 Gap Analysis. It was clear to see that Ian and Melissa had worked hard to implement sound systems that supported him to deliver the best possible service to his clients.

During the Gap Analysis, we identified a number of minor non-conformities and opportunities for improvement which Ian and his team were keen to implement.

After a short period of implementation we carried out Ian's assessment.

It was clear to see the effort that had been made to bring Ian and his business in line with the requirements of the ISO 22222 standard and after a successful assessment; it was our honour to award Ian with his ISO 22222 certification.

Ian is a true testament to what being a "professional" is all about. Ian has the knowledge, the application skills, sound ethical principles and a belief that being a financial planner is not just about giving the best advice it's about being the best you can be in everything that you do.



"Ian is one of the professions leading and most respected advisers and it was a pleasure working with him as he achieved the profession's most prestigious accolade"

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:

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