

# Stand out from the competition with ISO 22222

## The 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 planners. With a vast number of investment schemes and financial planners to choose from, consumers are often confused about where to turn for advice on planning for their financial future.

The long awaited best practice standard has taken The International Standards Organisation (ISO) and the British Standards Institution (BSI) seven years to develop. The major trade and professional bodies, such as the FSA, Institute of Financial Services, AIFA, The CII and the consumer group Which? have played a pivotal role in the development of the standard.

ISO 22222 is aimed at increasing client confidence by providing an internationally agreed benchmark for a high global standard of service. The standard covers the ethical behaviour, competences and experience required of a financial planner. This also enhances the transparency and efficiency of the process for personal financial planning.

The ISO standard defines 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.

### Benefits to the Financial Planner

- Improved level of professionalism.
- Gain a competitive edge.
- Optimise their marketing and sales opportunities.
- Improve their reputation and profile.
- Attract and maintain a higher calibre of employee.

### Benefits to the consumer

- Better Service.
- Improved transparency of services provided.
- Improved confidence and trust in financial planners.
- For maximum credibility financial planners will be third-party accredited by a professional certification body which ensures their services are continually improved and benchmarked.
- Access to evidence of qualifications, experience and competency.



Accreditation is simpler  
than you think - we can  
take you through the  
whole process.

By adopting the ISO 22222 requirements and recommendations the financial planner will be able to demonstrate continued competency following the necessary training programmes and maintaining records of these so that conformity to a high academic standard can be claimed.

Standards International is the first certification body certified to provide training, pre assessment and assessment for the internationally accepted benchmark which we believe will enable consumers to identify financial planners who possess the right knowledge, skills, ethics and experience to deliver their desired level of service.

To be one of the UK's first certified financial planners download an application pack from our website [www.standardsinternational.co.uk](http://www.standardsinternational.co.uk) or contact us on 01462 790894.



Why not stand out from the competition with ISO 22222 – the quality standard for providing personal financial planning.

## About Standards International

Standards International is pioneering best practice amongst personal financial planners in the UK and overseas. We are the only certification body in the UK to specialise in the promotion, training, pre-assessment, assessment and certification for the ISO 22222 standard.

We are passionate about increasing the level of professionalism within financial services and our aim is to support financial planners to deliver service excellence to their clients and as a result develop a sustainable future for all.

As the founders, we provide a unique offering. Our combined experience in implementing International Standards and years of experience in assisting financial advisers to operate more efficiently is unrivalled.

Standards International is the UK's first dedicated ISO 22222 certification body to achieve accreditation to ISO/IEC 17024 with the United Kingdom Accreditation Service (UKAS).

We are now offering independent third party ISO 22222 certification services to financial planners..

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