

Increase your professional standards with ISO 22222

The only international quality standard for providing personal financial planning



Certification is simpler than you think – The team at Standards International can take you through the whole process



One of the major issues reported by consumers when seeking financial advice is the uncertainty over whether they can trust their financial planners. With the 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.

ISO 22222 is the long awaited best practice standard and was created by leading professionals in the UK and overseas. It took 7 years to create and is gaining much momentum amongst professional planners within the financial services arena.

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.

At the core of the ISO standard sits 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 operate in a true best practice manner.

Benefits to the Financial Planner

- Improved performance
- Simplified and effective processes and documentation
- Standardisation of good working practices
- Improved communication
- Promotes awareness of quality, professionalism, better public awareness and public image
- Improved sales and marketing opportunities
- Exemption from the Chartered Insurance Institute (CII) AF5 module
- Reduced risk = potential reduced insurance costs
- Improved compliance – Supports regulatory requirements

Benefits to the consumer

- Receive a more professional and consistent service
- Adds value to the services provided by the financial planner
- Assurance of quality of service
- Evidence of commitment to continual improvement and compliance through independent third-party certification
- Enhances business relationships – building trust and securing repeat business
- 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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By adopting and maintaining the ISO 22222 requirements and recommendations the financial planner will be able to demonstrate a continued and high-level commitment to an international standard benchmark of best practice.

Standards International is the first certification body accredited to provide pre-assessment to assessment services 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 join your fellow leaders in the market place, download an eligibility application form from our website www.standardsinternational.co.uk or contact us on 01462 790894.



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. They are the only certification body in the UK to specialise in the promotion, training, pre-assessment, assessment and certification for the ISO 22222 standard.

Standards International are passionate about increasing the level of professionalism within financial services and their 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, they provide a unique offering. Their combined experience in implementing international standards and years of experience in assisting financial planners and firms 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).

For further information about ISO 22222 certification services please contact:

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