

Ready to meet your expectations

Why you can expect fair treatment
and professional standards from us



The PFS Code of Ethics and Conduct



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In setting the highest standards for technical knowledge, customer service and ethical practice across the entire financial advice community, the PFS obliges its members to comply with its Code of Ethics and Conduct. The Code gives a clear indication of how you can expect us to act and conduct your affairs.

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Core Values

You can expect PFS members to demonstrate and uphold these values in all our dealings with you:



This means that you are entitled to expect courtesy, honesty and fairness towards you and anyone else we deal with. You can also expect us to be trustworthy and never put our interests or those of others above yours.

How the Personal Finance Society helps you

This leaflet has been given to you by a member of the Personal Finance Society (PFS) – the financial services arm of the CII. Over 100 years old, the CII is the world's leading professional organisation for insurance and financial services. With 90,000 members in 150 countries, the CII is also the world's largest professional body for individual financial advisers (and those in related roles).

The PFS sets standards within the profession to benefit and protect consumers. As a condition of membership, members have to commit to continuous professional development, through learning and examination, to make sure their knowledge is up to date.

This means that you can trust in the competence and conduct of PFS insurance and financial services professionals wherever you are. So you can rely on us to maintain accurate and relevant knowledge and to give you appropriate and unprejudiced advice.

The PFS also encourages its members to have the highest ethical standards, as we are obliged to comply with the Society's Code of Ethics and Conduct. And this leaflet outlines how this Code helps us work for you.