



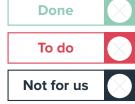
# **Checklist #2: Promoting your Chartered Status**

You've worked hard to attain Chartered status, whether it's for you as an individual or your firm, why wouldn't you want to promote it as effectively as possible? Especially as a CII survey of high net worth business owners and SME owners in 2016 found that 77% were more likely to select a Chartered firm over a firm without the same status.



# Use the correct logo

The Chartered logos have recently changed, it's important that you use the most recent version. There are also subtly different versions for a Chartered Financial Planner and a Chartered firm.





# Add it to your website

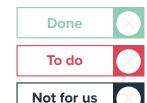
If you are a Chartered firm, the logo should be shown on the homepage of your website, preferably in the header. If you are a Chartered adviser within a non-Chartered firm, then the logo should only be used on pages which are dedicated to the adviser who holds the designation.





### **Explain more about your Chartered status**

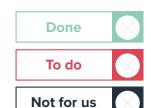
It isn't enough to simply display the logo. Your website should contain a page explaining what you had to do to obtain your Chartered status, why it's important and how it benefits your clients. The page should then be linked to the logo.





### Embed the CII's video in to your website

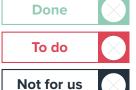
The CII produce a free video to help advisers promote their Chartered status. It's simple enough to embed on your website; either on the page which explains your Chartered status, or the appropriate adviser pages. You can find the videos by clicking <a href="here.">here.</a>





# Your 'why choose us' page

Every adviser website should have a 'why choose us' page. Your Chartered status should feature heavily on this page.



Done Your Unbiased & VouchedFor profiles Your Chartered status should be included on these directories as 6 To do appropriate. If you are recently Chartered remember to update your profiles; they are easy to forget. Not for us Done Add to email footers These are often overlooked but you send countless emails each day. 7 To do Incorporate the logos in to your email footer along with a link to the page on your website where you explain the benefits of your Chartered status. Not for us Done **Newsletters** If you produce newsletters it does no harm to include the appropriate 8 To do Chartered logo, along with a link to the previously mentioned page on your website. Not for us Done Stationery Letterhead, compliment slips, business cards, brochures and folders 9 To do should all include the appropriate Chartered logo. If you produce a printed brochure, reserve a space to explain the benefits to your clients Not for us of your Chartered status. Your office Done If clients visit your office for meetings, consider adding the appropriate logo to your reception area and signage. Don't forget to display your 10 To do certificates proudly and create literature explaining why you are Chartered, and how it benefits your clients, people will read these while Not for us waiting in your reception area for meetings. **Press releases** Done

If you are a newly Chartered adviser or firm it's the sort of thing the local

press may be interested in. You won't know until you ask them. The CII have a library of sample press release and client communications that

can be used as a starting point to send out to your clients.

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To do

Not for us

# LinkedIn Add your appear in

Add your Chartered status to your LinkedIn job title; it'll help you appear in the results when someone searches for a Chartered Financial Planner. Explain in your profile too what it means to be Chartered and how it benefits your clients.



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### Other social media profiles

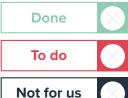
Again, add the logo (ensuring it's used within the CII's brand guidelines) to your social media profiles. You never know what will make the difference to someone getting in touch, or not.



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#### The CII Chartered database

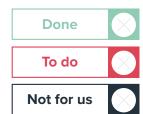
The CII has a directory where all Chartered firms are listed; you can find it by clicking <a href="here.">here.</a> Too many firms fail to fully complete their profile, missing email addresses, telephone numbers and websites. Make sure your profile is fully completed.





### **Communicate internally**

Your staff probably know that your firm, or advisers are Chartered. But do they know why, how it was achieved and, most importantly, how it benefits your clients? Train your staff on all these points and show them how to communicate these to the outside world.



### We hope you found this useful

As we said, you've worked hard for your Chartered status, why wouldn't you want to promote i effectively?

You will no doubt have completed many of these already, but if you would like help on any you are struggling with, or you have other questions, we are here to help.

You can reach us by calling 0115 815 7770 or emailing hi@theyardstickagency.co.uk

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