



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.

1

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.

Done	<input type="checkbox"/>
To do	<input type="checkbox"/>
Not for us	<input type="checkbox"/>

2

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.

Done	<input type="checkbox"/>
To do	<input type="checkbox"/>
Not for us	<input type="checkbox"/>

3

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.

Done	<input type="checkbox"/>
To do	<input type="checkbox"/>
Not for us	<input type="checkbox"/>

4

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 [here](#).

Done	<input type="checkbox"/>
To do	<input type="checkbox"/>
Not for us	<input type="checkbox"/>

5

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	<input type="checkbox"/>
To do	<input type="checkbox"/>
Not for us	<input type="checkbox"/>

6

Your Unbiased & VouchedFor profiles

Your Chartered status should be included on these directories as appropriate. If you are recently Chartered remember to update your profiles; they are easy to forget.

Done



To do



Not for us



7

Add to email footers

These are often overlooked but you send countless emails each day. 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.

Done



To do



Not for us



8

Newsletters

If you produce newsletters it does no harm to include the appropriate Chartered logo, along with a link to the previously mentioned page on your website.

Done



To do



Not for us



9

Stationery

Letterhead, compliment slips, business cards, brochures and folders should all include the appropriate Chartered logo. If you produce a printed brochure, reserve a space to explain the benefits to your clients of your Chartered status.

Done



To do



Not for us



10

Your office

If clients visit your office for meetings, consider adding the appropriate logo to your reception area and signage. Don't forget to display your certificates proudly and create literature explaining why you are Chartered, and how it benefits your clients, people will read these while waiting in your reception area for meetings.

Done



To do



Not for us



11

Press releases

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.

Done



To do



Not for us



12

LinkedIn

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.

Done



To do



Not for us



13

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.

Done



To do



Not for us



14

The CII Chartered database

The CII has a directory where all Chartered firms are listed; you can find it by clicking [here](#). Too many firms fail to fully complete their profile, missing email addresses, telephone numbers and websites. Make sure your profile is fully completed.

Done



To do



Not for us



15

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.

Done



To do



Not for us



We hope you found this useful

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