
PRESS RELEASE

PRESTIGIOUS “CHARTERED STATUS” AWARDED TO OXFORD & BRIGHTON BASED FINANCIAL ADVISER

The Chartered Insurance Institute (CII) has awarded the prestigious ‘Chartered Financial Planners’ title to Isis Financial Planners who work out of Oxford, the Cotswolds and Brighton.

Chartered status is an exclusive title only awarded to firms which meet rigorous criteria relating to professionalism and capability. All Chartered Financial Planners commit to the CII’s Code of Ethics, reinforcing the highest standards of professional practice in their business dealings.

Isis Financial Planners, initially formed by partners Louis Letourneau, Jane Mudge and Maggie Fleming, specialises in providing personal wealth management advice particularly on investments, pensions and tax. In addition to Isis being Chartered two of the directors, Louis and Maggie (from the Brighton office) are both fully qualified members of STEP - The Society Of Trust And Estate Practitioners. These, plus other qualifications make the team at Isis Financial Planners some of the most experienced financial planners in the country.

Louis says that securing Chartered Financial Planners status is a landmark for him and his colleagues, *“We have always prided ourselves on the way that we use our knowledge, skills and experience to the benefit of our customers. As Chartered Financial Planners, we can signal our commitment to the highest levels of service to our customers. To date, there are fewer than 300 firms who have achieved Chartered status, indicating that this is a highly exclusive award reserved for the leading firms within the financial advice market. We are very pleased to be the first corporate Chartered Financial Planner in Oxford, 1 of 3 in Oxfordshire and 1 of only 4 in Brighton.”*

Editors' Notes

Chartered Insurance Institute (CII)

As the premier professional body for the financial services profession, the CII promotes higher standards of integrity, technical competence and business capability. With over 93,000 members in more than 150 countries, the CII is the world's largest professional body dedicated to this sector.

Individually, CII's members are able to drive their personal development and maintain their professional standing through an unrivalled range of learning services and by adhering to the CII's Code of Ethics & Conduct.

Isis Financial Planners Limited

Isis Financial Planners, independent financial advisers (IFA), was founded in February 2002 by Letourneau, Fleming and Mudge to provide a highly personalised professional financial planning and wealth management service from locations in the Cotswolds, Oxford and Brighton & Hove. They provide financial planning services for clients all over the UK, with many of these being in London and the south of England.

The team have always believed that one aspect of providing the best services to clients is to maintain and develop knowledge (in a constantly changing market). They have done this by pursuing recognised training and qualifications, that has culminated in them being awarded the corporate Chartered status and having two fully qualified members of STEP (the Society Of Trust and Estate Practitioners).

The testimonials on the company's website reflect the respect and gratitude from their customers, and in recognition of their knowledge and services they provide.

Isis Financial Planners currently advises on about £55M of clients' money.

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