
PRESS RELEASE

Prestigious “Chartered” Award For Oxford 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 in 1992 by partners Louis Letourneau, Jane Mudge and Maggie Fleming, specialises in providing personal wealth management advice particularly on investments, pensions and tax.

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."*

In addition to Isis being now being Chartered Financial Planners, 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.

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 is the only Chartered Financial Planner in Oxford, 1 of 3 in Oxfordshire and 1 of only 4 in Brighton.

Isis Financial Planners Limited

Isis was founded in February 2002 by Louis Letourneau, Maggie Fleming and Jane Mudge – three highly experienced Financial Planners who had previously worked for other specialist financial advisers in southern England.

They have always been determined to deliver the best financial advice to their clients, and have ensured that they have a robust system for continuing professional development and in gaining the top financial planning qualifications.

From their bases in Oxfordshire and Sussex they provide financial planning services for clients all over the UK.

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

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