



## Striving for Excellence

**At The Penny Group we realise the importance of continually striving to improve and offer the most up-to-date financial advice.**

**Recently this commitment was proven when we were awarded Chartered Financial Planning Status. This accolade allows us to join an elite group of 711 firms within the broking and financial planning sectors.**

The Chartered Insurance Institute (CII) required us to meet a rigorous set of criteria to show we offer the best possible advice and are fully supported by a dedicated team of qualified and knowledgeable staff. This includes evidencing high standards of training, ethics and good practice. As well as demonstrating our level of professionalism and desire to continually raise standards.

### Client benefits

In order to gain the Chartered Status The Penny Group had to show strong levels of technical knowledge and prove that we not only maintain these levels but continually update and improve on them.

Our advisers and support staff are constantly developing their skills and make every effort to go above and beyond the required standards. Ongoing training is an integral part of our daily routine. The Chartered Status also has the added benefit of ensuring all our staff are governed by a Code of Ethics, enforced by a set of disciplinary sanctions.

As a client you can rely on The Penny Group to offer objective advice, based on sound professional knowledge and with only your interests in mind.

### Our future

The Penny Group has worked relentlessly to build what we think is a great wealth management firm, that put the needs of our clients first. Ultimately our clients are our business and ensuring we provide the best possible service to them is paramount.

To keep our business sustainable, we must continue to grow and expand our knowledge base. This means recruiting well-rounded and knowledgeable staff.

We would like to thank all of our clients for being part of this journey and look forward to continuing to provide the best level of financial advice, across your personal and business lives.