



Chartered status
Our big investment





A handwritten signature in black ink that reads "Sam Instone". The signature is fluid and cursive.

Sam Instone
Chief Executive Officer
AES International

What our Chartered status means for you

What do you look for in a firm of financial advisers?

That it is ethical and puts your interests first? That its people are competent, knowledgeable and committed to maintaining their professional capability?

Those are precisely the qualities embodied by Chartered status – the reason we are proud to have achieved the title Chartered Financial Planners.

Chartered status is an objective mark of professional standing among all professions. It is awarded to firms that can demonstrate commitment to developing knowledge, enhancing capability, and maintaining ethical standards.

The title Chartered Financial Planners is granted by the Chartered Insurance Institute (CII), the professional body for insurance and financial services.

Chartered firms must meet serious obligations

To retain our title we must ensure the advice, service and ongoing support we provide to you are of the highest quality.

Our advice must be based solely on your researched needs, and provided by someone competent and qualified to discuss products and services that meet your requirements.

We ensure our technical and professional knowledge and competence through professional qualifications.

We keep our knowledge and skills up-to-date through continuing professional development.

And our staff must be members of the Personal Finance Society (the financial planning arm of the CII Group) and comply with its Code of Ethics, which is enforced through disciplinary sanctions.

Our Chartered title means a lot to us. It was not easily achieved, it takes continuous investment in customer service and commitment to professionalism to maintain, but we will maintain it because it makes all the difference in terms of outcomes and satisfaction for our clients.

If you would like to know more about how we can help you, **please do get in touch.**

Contact us

T: 020 3051 7999

F: 020 7084 7750

W: www.aesinternational.com

Elysium Gate

126-128 New Kings Road

London

SW6 4LZ

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IMPORTANT NOTE: This guide aims to provide general information on investing. It is a short and simplified summary of a complex subject, so please do not make any decisions based solely on the contents of this guide. Whether or not investments are appropriate to you will depend on many factors, including your individual needs and circumstances. For a personalised recommendation, please contact AES International.