



BERRY & OAK

CHARTERED FINANCIAL PLANNERS

Our Accreditations



When it comes to your money, you want someone who knows what they're doing. So it's good to know that we're all professionally qualified, have many years' experience and work to the highest professional standards.

Our Accreditations

CISI Accredited Financial Planning Firm (AFPF)

The Chartered Institute for Securities and Investments (CISI) sets standards of professional excellence and integrity for the securities, investment and financial planning industry. To be an accredited firm we have to meet the CISI's rigorous ethics, competence and professional practice standards and demonstrate that Financial Planning is at the core of what we do. There are currently less than 80 firms in the UK with this accreditation.



Chartered Financial Planner Firm

We have been awarded the prestigious title of 'Chartered Financial Planners' by the Chartered Insurance Institute. It shows how committed we are to developing and maintaining the knowledge and capability of our people, so we can deliver the highest quality advice to our clients. We also work in an ethical manner that places client's interests at the heart of the advice we give. Each year we undergo a rigorous reassessment to enable us to retain the title. The Privy Council authorised the CII to issue the Chartered Title in 2005. Thus, a Chartered Financial Planner, has comparable qualifications as other established professions, such as Chartered Accountants and Chartered Surveyors.

The British Standard BS 8577

This is a British Standard that assesses and awards financial planning firms who can demonstrate that they have the operation framework in place to deliver a first class service to their clients. This is independent due diligence that is undertaken on our firm and the processes we follow, to ensure we deliver consistent and appropriate financial advice to our clients. There are currently less than 29 firms in the UK with this accreditation.



We are currently the **ONLY** firm in Yorkshire that holds the Accredited Financial Planning Firm, Chartered Financial Planner Firm and BS 8577 status.

ISO 22222
CERTIFIED



The International Standard ISO 22222

This is an accreditation that is assessed against each individual financial planner on an individual basis was created to achieve and promote consumer confidence by providing an internationally agreed benchmark for a high global standard of personal financial advice. As holders of this standard, we have to adhere to specific requirements and follow a framework that covers ethical behaviour, competencies and experience. We are very pleased that all Andrew Elson & Sarah Elson passed this standard first time and have maintained it annually since.

Our Recent Awards

New Model Adviser “Firm of the North” Award 2019

This award recognises the top financial planning firms across the UK and are based on a number of factors such as the level of staff qualifications, having a well thought out investment proposition, a carefully segmented client base, good use of technology, as well as investing in the next generation of new talent in the financial services profession. We are very pleased to have been recognised in this way.



Professional Adviser – “Financial Adviser Firm of the year – North East” 2019.

This award was judged and voted on by an independent panel of industry experts, made up of financial advisers, business consultants, fund researchers, platform specialists and other financial services sector experts. This allowed them to look at the facts when compared with competitors and provide a non-biased assessment.

Yorkshire Financial Awards 2019 – “Best Employer”

We are delighted to win this award, that recognises the development and support we give our team members, whilst involving them in the running and growing of our business. We were also a finalist in 2 other categories in 2019; Best Adviser Team and also Best Client Engagement.



Retirement Planner – Best Individual Pensions Advice Firm of the Year Award 2019 – The North and Scotland

Berry & Oak are very proud to have been recognised as the best pension advisers in the region. Berry & Oak were also finalists for this same award in 2018. The judges, which included the CEO of the Personal Finance Society (the largest professional body in financial services) and both current joint chairs of the Society of Later Life Advisers (a not for profit consumer organisation) based their decision on ‘qualifications, commitment to their clients and the company’s expert pension advice’

Summary

In order to win these awards, we have to work on complex, but real client case studies and provide comprehensive solutions and guidance. We deliberately invest time and effort to apply for these awards, so that we can demonstrate our knowledge, and planning expertise externally and reassure clients and our professional circle, that they are dealing with the best team.



You're in safe hands **with Berry & Oak.**

CISI Accredited Financial Planning Firm™

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Chartered Financial Planner Firm

We have been awarded the prestigious title of Chartered Financial Planner which reflects how committed we are to developing and maintaining the knowledge and capability of our people so we can deliver the highest quality advice.

