

PRESS RELEASE

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CHARTERED BODY ALLIANCE



Chartered Body Alliance welcomes new member the CFA Society of the UK

The [Chartered Body Alliance](#) (the Alliance) is pleased to welcome the CFA Society of the UK (CFA UK) as a new member.

The Alliance's founding members include the Chartered Institute for Securities & Investment (CISI), the Chartered Insurance Institute (CII) and the Chartered Banker Institute. It was formed in 2017 to serve the public interest and support the members of each body by sharing insights and knowledge on a range of issues important to the financial services sector, be these around culture and ethics or specific regulatory questions or policy development, such as most recently with the use of AI in financial services.

With a joint membership of almost 225,000 professionals, including new member the CFA UK, the Alliance works to demonstrate a substantial collective commitment to enhancing professionalism and improving public confidence and trust in UK financial services.

The Alliance promotes the importance of professionalism, lifelong learning, and integrity within financial services, offering thought leadership on key issues facing the sector. Its member bodies aim to achieve this by sharing information and collaborating to identify challenges and opportunities, engaging in dialogue with regulators, government, and other stakeholders.

Tracy Vegro OBE, CISI Chief Executive said: "We are delighted to welcome CFA UK to the Chartered Body Alliance. Their joining is testament to our collective objective of promoting the highest professional standards to build public trust in all aspects of the provision of financial services to the end consumer. We look forward

to their guidance, thought leadership and sharing of best practice as we continue to highlight to the consumer the importance of engaging with qualified professionals.”

Matthew Hill, CII CEO said: “The Chartered Body Alliance exists to raise professionalism, promote high standards and make it easier for the public to access the services of qualified professionals. In welcoming CFA UK, we extend our reach and enhance our collective potential to educate individuals and wider society about the benefits of seeking professional advice.

Tanya Retter, Director of Education, Chartered Banker Institute said: “We are delighted to welcome CFA UK and their 12,000 investment professionals as the newest member of the Chartered Body Alliance. With a collective membership of nearly 225,000 finance professionals, the Alliance remains dedicated to upholding and advancing professional standards. Our mutual commitment to fostering public trust in financial services is evident in our dedication to promoting high standards of knowledge, skill, integrity and behaviour among our members and their employers.”

Will Goodhart, CFA UK Chief Executive said: “We are grateful for the opportunity to join CISI, CII and the Chartered Banker Institute in promoting the highest standards of ethical and professional conduct across the UK’s financial services sector and beyond. The Chartered Body Alliance helps the different parts of the finance profession to work together in the public interest and we are delighted to be joining the group so that we can support and contribute to its mission.”

For further information on the CISI contact Lora Benson +44 20 7645 0662/ +44 7801 521034 or lora.benson@cisi.org

About the Chartered Institute for Securities & Investment

The CISI’s mission is to help members attain, maintain and develop their knowledge and skills and to promote the highest standards of ethics and integrity in the securities and investment profession.

Based in the City of London, with origins in the London Stock Exchange, the CISI is a charity with global reach through its representative offices in financial centres such as Colombo, Dubai, Dublin, Glasgow, London, Manila, Mumbai and Nairobi. We work in close cooperation with regulators, firms and other professional bodies worldwide.

For further information on the CII contact press@cii.co.uk

About the Chartered Insurance Institute

The Chartered Insurance Institute is the professional body dedicated to building trust in the insurance and financial planning profession. Our strapline Standards. Professionalism. Trust. embodies our commitment to driving confidence in the power of professional standards: competence, integrity, and care for the customer.

We deliver that commitment through relevant learning, insightful leadership, and an engaged membership. Our members commit to high professional standards by maintaining continuous professional development and abiding by our Code of Ethics.

About the Chartered Banker Institute

The Chartered Banker Institute (“the Institute”) is the oldest professional banking institute in the world. The Institute was founded in 1875, operates globally, with over 35,000 members in over 100 different countries and nearly 1,000 financial institutions worldwide.

The Institute has driven an agenda of ethical professionalism throughout its existence; promoting professional standards for bankers, providing professional qualifications for retail, commercial and private bankers, and offering professional membership to qualified individuals. For more information, please visit:

www.charteredbanker.com.

For further information on the Chartered Banker Institute contact:

Matthew Ball, Head of Public Affairs, Chartered Banker Institute. E-mail:
matthew.ball@charteredbanker.com

About the CFA UK

CFA UK serves nearly 12,000 members of the UK investment profession. Many of our members analyse securities, manage investment portfolios, advise on investments, or are in roles responsible for investment operations or oversight.

Our role is to help investment professionals build and maintain their skills and competencies so that they are technically and ethically competent to meet their obligations to clients. We advocate for high standards of ethical and professional behaviour and our work with regulators, policymakers and standard setters is focused on skills, knowledge, and behaviour.

We are not a lobby group or a trade body. We are an independent, professional association whose mission is to ‘educate, connect and inspire the investment community to build a sustainable future.’

Founded in 1955, CFA UK is one of the largest member societies of CFA Institute. Most of our members have earned the Chartered Financial Analyst® (CFA®) designation. All our members are required to attest to adhere to CFA Institute’s Code of Ethics and Standards of Professional Conduct.

For more information, visit www.cfauk.org or follow us on Twitter @cfauk and on [LinkedIn.com/company/cfa-uk/](https://www.linkedin.com/company/cfa-uk/)

For further information on the CFA Society UK contact:
chiefexecutive@cfauk.org