



## CUSTOMER SERVICE STATEMENT

The Institute of Financial Planning is committed to providing high quality services, events, qualifications, and education for all our stakeholders in support of building the profession of Financial Planning in the UK.

This statement will help us monitor our service and continually improve that service.

### **What you can expect from IFP**

We will:

- Make the interests of members our priority
- Give prompt, helpful and friendly response to telephone and e-mail enquiries, normally within two working days
- Answer telephone calls promptly (within four rings) and professionally
- Respond to written correspondence within seven working days
- Deal with complaints promptly providing an initial response within five working days
- Deal with financial transactions within two months
- Protect our members' confidential information
- Make an initial response to complaints within five working days
- Provide regular updates on our website to keep stakeholders informed of all our latest news and guidance in all areas
- Provide regular updates via post, journal, pr and email and respect member's wishes with regard to email communications
- Maintain full and accessible current information on our fees and regularly review our pricing to ensure we offer value for money
- Give professional and individual advice where appropriate when you seek clarification prior to any assessment or event
- Offer qualifications with appropriate national accreditation and international recognition
- Support our facilitators, candidates and staff through forward-looking course material, publications and training

- Include clear and simple guidance notes in all our course material and handbooks, and where possible offer these online
- Have confidential and secure procedures for storing case studies, written papers and blank certificates
- Ensure that candidates are examined by highly trained professional assessors
- Dispatch confirmation of results within the timeframes and through the methods announced in our supporting documents
- Respond to formal appeals as detailed in our course material, with an independent opinion at the ultimate level
- Ensure that candidates have access to suitable assessment facilities
- Immediately investigate allegations of malpractice in relation to our assessment system
- Keep records of candidates' achievements and respond to legitimate requests for these records
- Continue to ensure that we are committed to providing equality of opportunity and treatment for all, and that we will not unlawfully or unfairly discriminate directly or indirectly on the basis of gender, age, ethnic origin or disability in our dealings with members, candidates, facilitators, assessors, representatives or sponsors
- Use best practices and implement policies and procedures to ensure that members are dealt with on a consistent and fair basis
- Undertake to listen to and consult with Welsh speaking members to determine their needs and monitor verifiable demand for Welsh language assessment
- Provide our members and sponsors with the opportunity to comment on all aspects of our service by contacting us at any time
- Comply in all areas of the UK Data Protection Act
- Comply with all current relevant statutory legislation

If you wish to comment on this statement or any service offered by the IFP, please contact us direct on [enquiries@financialplanning.org.uk](mailto:enquiries@financialplanning.org.uk) or by post to Operations Director, IFP, Whitefriars Centre, Lewins Mead, Bristol, BS1 2NT. Our offices are open 8am-5pm Monday to Friday, excluding bank holidays, to answer any queries. Phone number: 0117 9452470, fax: 0117 9292214.