

Marks Use

Contents

Page

Introduction: Fast Start

2

Rules for Use of the CFP® Certification Marks

3

Reproduction Guidelines for the CFP® Certification Marks


6

Practitioner Manual

Introduction: Fast Start

The purpose of 'Fast Start' is to get you going in the right direction on the proper usage of the marks, fast. Please refer to the rest of this manual for instructions.

As a CFP® certificant, you are allowed to use the following three certification marks in your communications and collateral materials. These certification marks **MUST** be used under strict reproduction guidelines, or their value as certification marks could be lost.

1. CFP®
 - Always use all capital letters.
 - Never use periods.
 - Always use the "®" superscript.
2. CERTIFIED FINANCIAL PLANNER™
 - Always use all capital (or large and small capital) letters.
 - Always use the "TM" superscript.
3.  CFP®
 - Always use all three components of the logo (flame, "CFP" and "®").
 - Always reproduce the logo from original artwork.
 - Never alter or modify the logo.

Other Dos and Don'ts

Always use CFP® or CERTIFIED FINANCIAL PLANNER™ as descriptive adjectives, never as nouns.

- Correct:** I am a CFP® practitioner.
Incorrect: She is a CFP® with offices in Colorado.



Never use CFP® or CERTIFIED FINANCIAL PLANNER™ as plural.

- Correct:** John Jones and Mary Smith are CFP® practitioners.
Incorrect: John Jones and Mary Smith are CFPs®.

Where possible, use the following tagline in printed communications and marketing materials.

CFP®, CERTIFIED FINANCIAL PLANNER™ and  are certification marks owned outside the U.S. by Financial Planning Standards Board Ltd. Financial Planning Association of Singapore is the marks licensing authority for the CFP marks in Singapore, through agreement with FPSB.

Rules for Use of the CFP® Certification Marks

1. The  mark comprises three components, the flame element, the initials “CFP” and the “®” trademark symbol. These components must be used together as one unit at all times, to protect the visual integrity of the mark.
2. All reproduction of the  mark must be made from original reproduction artwork provided by FPAS, either in this guide or separately. Under no circumstances may the mark be altered, modified, hand-drawn, typeset, reproduced or electronically scanned in such poor quality as to distort or significantly alter its appearance.
3. The mark CFP® must appear in all capital letters, without periods between the letters. The mark CERTIFIED FINANCIAL PLANNER™ should appear in all capital letters or in large and small cap font.

Correct:

John Jones, CFP®

John Jones is a CERTIFIED FINANCIAL PLANNER™ practitioner.

John Jones is a CERTIFIED FINANCIAL PLANNER™ certificant.

Incorrect:

John Jones, C.F.P.

John Jones, cfp

John Jones is a certified financial planner practitioner.

4. The mark CFP® should always appear with a superscript “®” trademark symbol. In text documents or in the content of individual Web URLs, only the first use of each mark needs the “®” symbol.

Correct:

Jane Jones is a CFP® certificant. Her clients like working with a Certified Financial Planner™ practitioner.

5. Do not use the mark CFP® as a parenthetical abbreviation for CERTIFIED FINANCIAL PLANNER™.

Incorrect:

John Jones is a CERTIFIED FINANCIAL PLANNER™ (CFP®) practitioner.

6. The marks CFP® and CERTIFIED FINANCIAL PLANNER™ may not be used in plural or possessive forms.

Correct:

Jane Jones and John Doe are CFP® certificants.

The seminar designed for CERTIFIED FINANCIAL PLANNER™ professionals was sold out.

Incorrect:

Jane Jones and John Doe are CFPs®.

The CERTIFIED FINANCIAL PLANNER’s™ seminar was sold out.

7. The CFP® and CERTIFIED FINANCIAL PLANNER™ marks must be used as descriptive adjectives, not as nouns. This prevents the marks from being used generically as a noun or verb to describe a broad group of individuals or services. References to all colas as Cokes or

all credentialed financial planners as “CFPs” or “CERTIFIED FINANCIAL PLANNERS” [sic] are generic uses that put the legal status of these trademarks at risk.

Correct:

She's a CFP® practitioner.

We are CERTIFIED FINANCIAL PLANNER™ certificants.

Incorrect:

He is a CFP® who has offices in Colorado.

John Doe and Mary Smith are CERTIFIED FINANCIAL PLANNERS™.

CFP™ Jane Jones won the award.

8. The marks CFP® and CERTIFIED FINANCIAL PLANNER™ may appear once in the meta-text of each Web page belonging to an individual currently certified by the CFP Board.

Correct:

<META name “keywords” content = “CERTIFIED FINANCIAL PLANNER, CFP”>

Incorrect:

<META name “keywords” content = “CERTIFIED FINANCIAL PLANNER, CERTIFIED FINANCIAL PLANNER, CERTIFIED FINANCIAL PLANNER, CFP, CFP, CFP, CFP”>


9. The CFP® and CERTIFIED FINANCIAL PLANNER™ marks may not be used as part of an email address, domain name or other Internet address. They may appear as text or images throughout the Website, following rules for proper usage.

Incorrect:


John_Doe@CFP4u.com

www.JohnDoeCFP.com


www.ACMEFinancial.com/cfp

10. The CFP®, CERTIFIED FINANCIAL PLANNER™ and  marks may be used as hyperlinks on an individual's Website if they link directly to FPAS' home page (www.fpas.org.sg).

11. The marks CFP®, CERTIFIED FINANCIAL PLANNER™ and  must be clearly linked to the individual certified by FPAS.



12. The following tagline must be used when featuring the CFP®, CERTIFIED FINANCIAL PLANNER™ or  marks in articles, advertisements, Websites, brochures or other promotional literature. If space is limited, use of the first sentence is acceptable.

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13. The form of the CFP®, CERTIFIED FINANCIAL PLANNER™ and  marks may not be altered by modifying them in text form, animating them, making them three-dimensional, or using them on a patterned background, as a watermark, or as part of the background itself. Special reproduction techniques such as embossing, foil stamping, postage meter imprints, etc. must be pre-approved by FPAS.


Incorrect:

Mary Smith was certified in Financial Planning.
Jane Jones, a CFP-type.
John Smith does certified financial planning.

14. The marks CFP[®], CERTIFIED FINANCIAL PLANNER[™] and  may not be used in a way that makes it difficult for FPAS to exert its ownership rights in the marks (i.e., incorporated into a trademark, phone number, business logo, business name or domain name provided by a third party).
15. The marks CFP[®], CERTIFIED FINANCIAL PLANNER[™] and  may not be used to imply CFP Board's or FPAS' endorsement of a company (even when one or more members are certified to use the marks), nor may they be used as the name of an investment product or plan.

Incorrect:

Smith Certified Financial Planner Services
John Doe, CFP and Associates, Inc.
The Delta CFP Investment Plan

16. The marks CFP[®], CERTIFIED FINANCIAL PLANNER[™] and  may be used on promotional items provided the following requirements are met:
- The marks are associated with the name of an individual currently certified by FPAS.
 - The date of the promotion is noted.
 - The use of the marks meets the rules and requirements of this guide.
 - The promotional items are not produced for re-sale.
 - The promotional items are in good taste and do not denigrate the marks.

Reproduction Guidelines for the CFP Certification Marks

When developing business materials that feature the CFP®, CERTIFIED FINANCIAL PLANNER™ and CFP® certification marks, you will want to share relevant use rules and reproduction guidelines with any production specialists with whom you may work. During the production process, we ask that you protect original reproduction artwork provided by FPAS from being used by unauthorized persons.

A. Readability

To maintain readability of the registered symbol, three relationships between the CFP® mark and the trademark symbol “®” have been developed. Use relationship A when the mark measures greater than 1/2”, relationship B when the mark measures between 1/2” and 9/32” and relationship C when the mark measures 1/4”. Reproduction art of the CFP® mark in all three registered mark relationships is included with this guide.

Relationship A	Relationship B	Relationship C	Relationship D
<p style="text-align: center;">> 36 mm</p> <p style="text-align: center;">x [CFP] = 1/4 x</p>	<p style="text-align: center;">12-36 mm</p> <p style="text-align: center;">x [CFP] = 1/3 x</p>	<p style="text-align: center;">7-12mm</p> <p style="text-align: center;">x [CFP] = 1/2 x</p>	<p style="text-align: center;">6mm</p> <p style="text-align: center;">x [CFP] = 3/4 x</p>
<p>This size relationship is to be used when it is greater than 36mm (logo shown is 36mm).</p>	<p>This size relationship is to be used when it is between 12 and 36mm (logo shown is 20mm).</p>	<p>This size relationship is to be used when it is between 7 and 12mm (logo shown is 10mm).</p>	<p>This size relationship is to be used with in text, paragraphs and should be no smaller than 6mm in width.</p>

Logo Size

To control the quality of the CFP Logo Mark's appearance, FPSB requires all reproductions to be made from original artwork, readable, legible and on approved backgrounds.

Minimum Size

To ensure optimum legibility of the CFP Logo Mark, a minimum size of 6mm width is recommended (see Relationship D).

Original Artwork



To obtain positive and reverse reproduction images, contact FPSB at info@fpsb.org.

Tagline


CFP®, CERTIFIED FINANCIAL PLANNER™ and CFP® are certification marks owned outside the U.S. by Financial Planning Standards Board Ltd. Financial Planning Association of Singapore is the marks licensing authority for the CFP marks in Singapore, through agreement with FPSB.



B. Legibility



The impact and legibility of the printed CFP® mark will be lessened by crowding it with copy or other visual elements. A “clear zone” surrounding the mark has been established as an area into which no other graphic imagery, typography or other visual elements may enter. As shown below, this space is determined by the cap height of “CFP,” the typographic element of the CFP® mark.

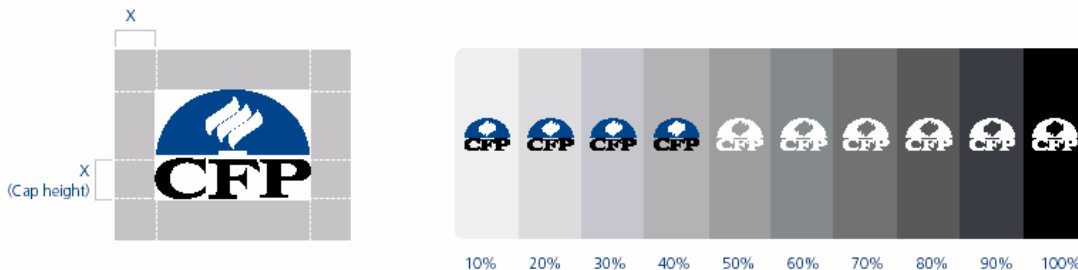
To ensure optimum legibility of the  mark, a minimum reproduction size of 1/4" is recommended. If reduced to a smaller size, the overall legibility and visual impact of the mark may be compromised. If reproduction quality of the  mark cannot be guaranteed when reproduced at 1/4", a larger size may be necessary.

C. Reproducing the  mark




All reproductions of the  mark must be made from original reproduction artwork provided by FPAS. To obtain positive and reverse reproduction images, download them from FPAS Website or contact FPAS office.

The positive  mark should be used on light colored backgrounds ranging from white to values no darker than 40% of black. The  mark should be reversed if used on dark backgrounds from 50%-100% value of black. Use the illustration below as a guide when determining background values.



Consistent use of color in the  mark is important to establish immediate recognition of individuals certified by the CFP Board. The preferred  color system is shown in example A below, PANTONE®* 280 Blue for the flame element and black for the "CFP" element. Also shown are other approved color options. Printers should refer to the PANTONE® color formula guide for an exact color and density match.



D. Stationery and Business Cards

Approved uses of the  mark, CERTIFIED FINANCIAL PLANNER™ and  marks for stationery and business cards are shown below. Remember to leave enough clear space around the  mark to enhance its visual impact.


E. Brochures and Signage

The  mark, CERTIFIED FINANCIAL PLANNER™ and  marks should be clearly linked to an individual or group of individuals certified by FPAS. As shown in example B, loose linkage of the marks to the certified individual could be misleading or confusing. Examples A, C and D demonstrate how a clear link can be created. Any printed materials distributed by you or your firm which display the CFP marks on the cover or in the body of the publication should include an appropriate tagline.

The following examples of promotional applications such as brochures and signage demonstrate general formatting principles and are not intended to show specific design standards. Please be aware that you will be required to remove any reference to the CFP marks in your corporate signage and promotional literature at your own cost if you become uncertified.

F. Directory Listings and Display Advertising

Directory Listings

The CFP[®], CERTIFIED FINANCIAL PLANNER[™] and  marks can be used to identify a group of individuals (e.g., in a Yellow Pages listing) if each individual is currently certified by FPAS. An individual, or group of individuals, certified by FPAS may appear in a directory listing under headings that include “Financial Planner,” “CERTIFIED FINANCIAL PLANNER[™] Practitioners” and “Financial Planning Consultant.” Headings such as “Financial Planner-Certified,” “Financial Planner-CFP” or “CERTIFIED FINANCIAL PLANNERS” are improper uses of the CFP marks and are therefore prohibited.

Display Advertising

An individual certified by FPAS may use the CFP marks in display advertising, provided that the advertising is not false or misleading, personal opinions are clearly identified, and such advertising is not otherwise prohibited. The ad may not give the impression that the individual is representing the views of FPAS, and statements about specific products or services should indicate that FPAS does not endorse such products or services.

Practitioner Manual