

PROPER USE OF CFP^{CM} MARKS: CERTIFIED FINANCIAL PLANNER^{CM}

Maintaining the distinctiveness of the mark

The distinctiveness and integrity of the CERTIFIED FINANCIAL PLANNER^{CM} mark and the right to use it can only be maintained if it is used correctly.

Example of correct usage of the designation

The following example sets out the correct usage of the designation:

Adam Brown CFP^{CM}

Adam Brown CERTIFIED FINANCIAL PLANNER^{CM}

Note:

- The above designation can only be associated with the individual member and not with the entity. It is not permissible to publish Adam Brown Ltd, CFP^{CM}
 - Only Modify Certain Nouns With the CFP^{CM} Marks. Since the CFP^{CM} Marks identify individuals who have met FPSB's certification standards, they should modify nouns that refer to individuals, the certification program or the marks themselves. The Institute has five approved nouns that can follow the CFP^{CM} Marks – professional, practitioner, certificant, certification or mark.
 - Incorrect –
 - CFP^{CM} firm
 - CFP^{CM} advertisement
 - My CFP^{CM} teacher was good instructor
 - Correct –
 - CFP^{CM} professional
 - CFP^{CM} practitioner
 - CERTIFIED FINANCIAL PLANNER^{CM} mark
 - CFP^{CM} must always be in capitals with no stops in between
 - Use only capital or small cap font. No title case to be used.
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Flame Logo Mark



The flame logo mark is a highly distinctive visual symbol that certifies an individual licensee has completed the educational, examination, and work experience requirements of the Institute.

It has been designed to readily identify CFP^{CM} practitioners to the general public and to clearly distinguish CFP^{CM} practitioners from all other financial planners.

The certification mark should be used in graphic promotion applications such as signage, business cards, personal stationery and advertising.

The mark is comprised of two graphic components: the flame element and the initials "CFP^{CM}".

Usage

- The flame logo mark may not be altered in any way.
- Any reproduction of the mark must be made from the original art work provided by the Institute.
- Whenever the mark appears in articles, advertisements or brochures, the following tag line must be used:

is a registered certification mark of the Financial Planning Standards Board Ltd.

Printing

- A “positive” mark should be selected for use on light coloured background
 - The mark may be reversed only if used on dark background (50%-100% value of black)
 - The mark must be printed in one colour, either in PANTONE 280 Blue or Black or any colour that is 50% value of black.
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When and how may the marks not be used

The designations may not be used:

- By persons who have not received authorisation from the Certification Committee to use the designations
 - By firms or institutes
 - As part of a name of a firm or firm’s logo – this rule applies even in cases where one or more firm members are authorised to use the mark in association with their own names
 - As the name of an investment product or plan, or
 - As a generic term
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Generic usage

Members shall be alert for generic usage, which occurs when the designation is used as the common name for a product or service.

Example

The reference to all Investment Advisers, Financial Planners and/or Investment Planners as “CFPs” is a generic use and is not permitted. For Example - the correct use would be CFP^{CM} professionals.

Incorrect usage

Correct use of the mark preserves its valuable reputation.

The policing efforts of the Institute protect the public and members alike by preventing misuse, misappropriation and misrepresentation of the marks.

The Certification Committee shall be notified promptly of any infringement or other improper use of the certification mark so that appropriate action can be taken. When the Committee learns of incorrect uses of designations it will notify the author or editor promptly so that future incorrect use will not occur.
