


Guide to use of the CFP^{CM} Marks

January 2012

The premier international financial planning designation is the CERTIFIED FINANCIAL PLANNER^{CM} designation. There are rules that govern how the mark and its abbreviations can be used. As part of our obligations to FPSB Ltd, the holder and issuer of the CFP^{CM} designation worldwide, the Institute of Financial Advisers requires all advisers holding the mark to observe a few simple rules when referring to the designation.

A person's use of the CFP Marks (CFP^{CM}, CERTIFIED FINANCIAL PLANNER^{CM} and ) identifies that he or she has met rigorous ethics, competency and professional practice standards to deliver financial planning in New Zealand, as established by FPSB Ltd. and locally adapted and administered by the Institute of Financial Advisers (the Institute).

To benefit the public, FPSB Ltd. ensures that the CFP Marks are protected and used properly in each territory where they are registered, and that any person using the CFP Marks has met appropriate certification requirements. The CFP^{CM} certification and service marks must be used in compliance with trademark law in each territory in which they are registered.

If trademarks or certification marks are used improperly, they could eventually lose their protected status. If this were to happen to the CFP Marks, CFP^{CM} professionals would lose the differentiation of the certification and consumers would be unable to rely on the CFP^{CM} certification as a mark of quality for professional personal financial planning. To prevent this, FPSB Ltd. requires all stakeholders to follow FPSB guidelines for the use of the CFP Marks and each FPSB Affiliate, including the Institute, to mandate proper use of the CFP Marks by CFP^{CM} professionals through a Code of Ethics and Professional Responsibility.

Please familiarise yourself with the contents of this Guide before using FPSB Ltd.'s CFP Marks. If you would like the Institute to review materials that you are developing which feature the CFP Marks, please contact us at info@ifaf.org.nz.

Institute of Financial Advisers, P O Box 5513, Wellington
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 CFP^{CM} and  are registered certification marks and CERTIFIED FINANCIAL PLANNER^{CM} is a common law certification mark owned outside the U.S. by Financial Planning Standards Board Ltd. Institute of Financial Advisers is the marks licensing authority for the CFP Marks in New Zealand, through agreement with FPSB.

TABLE OF CONTENTS

1. Rules for the Use of the CFP Marks
2. General Requirements for Using CFP Marks
3. Requirements for Using the “CFP^{CM}” Acronym Mark
4. Requirements for Using the “CERTIFIED FINANCIAL PLANNER^{CM}” Mark
5. Requirements for Using the Logo Mark
6. Rules for Reproducing the Logo Mark
7. Using the CFP Marks on Promotional Materials
8. Using the CFP Marks in Text Documents
9. Using the CFP Marks in Electronic Media
10. FPSB Ltd.’s Specific NZ Trademark Symbols and Legal Notice
- 11 Frequently Asked Questions

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THREE SIMPLE RULES

Assist the Institute and FPSB in protecting its CFP Marks by following three simple rules that apply to all trademarks.

Rule #1 – Always Use the CFP Marks as Adjectives

Although it sounds strange to the casual user, trademarks must never be used as nouns – a trademark must always be used as an adjective modifying a noun.

Incorrect

- I am a CFP.
- My planner is a CERTIFIED FINANCIAL PLANNER^{CM}.

Correct

- I am a CFP^{CM} professional.
- My CERTIFIED FINANCIAL PLANNER^{CM} practitioner is named Simon Lim.

Rule #2 – The CFP Marks Should Only Modify Certain Nouns

Since the CFP Marks identify individuals who have met the Institute's certification standards, they should only modify nouns that refer to individuals, the certification program or the marks themselves. The eight approved nouns include: certificant, certification, credential, designation, exam/examination, mark, practitioner and professional.

Incorrect

- CFP firm
- CFP advertisement
- My CFP teacher was a good instructor.

Correct

- CFP^{CM} professional
- CFP^{CM} practitioner
- CFP^{CM} certification
- CERTIFIED FINANCIAL PLANNER^{CM} mark

Rule #3 – Use the ^{CM} Identifier with the CFP Marks

Always use the ^{CM} superscript when referring to CFP^{CM}. There is also a legal notice that should be used. See section 10.

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1 Rules for Use of the CFP^{CM} Marks

1.1 The marks CFP^{CM}, CERTIFIED FINANCIAL PLANNER^{CM} and  should be used only as described in this guide.

1.2 CFP^{CM} professionals and other FPSB Ltd. stakeholders acknowledge that FPSB Ltd. is the sole, absolute and exclusive owner of all rights, title and interest in, and to, the CFP Marks outside the United States.

1.3 CFP^{CM} professionals and other FPSB Ltd. stakeholders will not challenge FPSB Ltd. as the sole, absolute and exclusive owner of all right, title and interest in, and to, the CFP Marks outside the United States, and the goodwill associated with these marks.

1.4 CFP^{CM} professionals and other FPSB Ltd. stakeholders will not challenge the validity of the CFP Marks.

1.5 CFP^{CM} professionals and other FPSB Ltd. stakeholders will not adopt, use or promote any mark that is confusingly similar to any of the CFP Marks, as determined by FPSB Ltd.


1.6 CFP^{CM} professionals and other FPSB Ltd. stakeholders will not take, encourage or promote any action that would/does impair the rights of FPSB Ltd. in and to the CFP Marks or the goodwill associated with them, or use the CFP Marks in a way that would make it difficult for FPSB Ltd. to assert its ownership of the CFP Marks outside the United States.

1.7 CFP^{CM} professionals are subject to the conditions relating to use of the CFP Marks as set forth in the Institute's Annual Renewal Form.


1.8 The CFP Marks must be used in a way that makes it clear that FPSB Ltd. owns them. The CFP Marks may not be used to imply FPSB Ltd.'s endorsement of an individual or company (even when one or more employees are certified by an FPSB Affiliate to use the CFP Marks).

1.9 The form of the CFP Marks may not be altered by modifying in text form, animating, making three-dimensional, or using them on a patterned background, as a watermark, or as part of the background itself.

1.10 Where possible, use a territory-specific legal notice (see section 10) or the following notice in materials that use the CFP Marks:

"Financial Planning Standards Board Ltd. (FPSB) owns the CFP^{CM}, CERTIFIED FINANCIAL PLANNER^{CM} and  marks outside the United States, and permits qualified individuals to use these marks to indicate that they have met FPSB's initial and ongoing certification requirements."

2 General Requirements for Using the CFP^{CM} Marks

CFP^{CM} professionals should follow FPSB Ltd.'s requirements when using the CFP^{CM}, CERTIFIED FINANCIAL PLANNER^{CM} and  marks in communication and collateral material. You will greatly assist FPSB Ltd. in protecting its CFP Marks if you follow three general rules that apply to all trademarks.

2.1 Always Use the CFP Marks as Adjectives

Although it sounds strange to the casual user, trademarks must never be used as nouns—a trademark must always be used as an adjective modifying a noun.

Correct Use:

I am a CFP^{CM} professional.

My CERTIFIED FINANCIAL PLANNER^{CM} practitioner is named Simon Lim.

Incorrect Use:

I am a CFP.

My planner is a CERTIFIED FINANCIAL PLANNER.

2.2 Only Modify Certain Nouns with the CFP Marks

Since the CFP 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. FPSB has eight approved nouns that can follow the CFP Marks—certificant, certification, credential, designation, exam/examination, mark, practitioner and professional.

Correct Use:

CFP^{CM} professional

CFP^{CM} practitioner

CERTIFIED FINANCIAL PLANNER^{CM} mark

Incorrect Use:

CFP^{CM} firm

CFP advertisement

CERTIFIED FINANCIAL PLANNER qualification

2.3 Use Appropriate Identifiers with the CFP Marks

In New Zealand the CFP^{CM} mark is trademarked and identified using the "CM" superscript, and the legal notice that describes its status is noted in the Trademark Legal Notices (section 10) and in this Guide for details on proper marks use in a territory.

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3.0 Requirements for Using the "CFP^{CM}" Acronym Mark

- Always use capital letters.
- Never use full stops (unless at the end of a sentence, e.g., "I received advice from Simon Lim, CFP^{CM}.").
- Always use the appropriate symbol (see section 10.0) for the country or region in which the mark is being displayed.
- Always use with one of FPSB Ltd.'s approved nouns: certificant, certification, credential, designation, exam/examination, mark, practitioner and professional (except as provided in Rule 3.4).

3.1 The "CFP" Acronym mark must appear in all capital letters and without periods between the letters.

Correct Use:

Simon Lim, CFP^{CM}

Incorrect Use:

Simon Lim, cfp

Greta Lange, C.F.P.

3.2 The "CFP" Acronym mark must appear with the ^{CM} superscript symbol (see section 10.0) for New Zealand.

Correct Use: (as first use in printed materials)

Greta Lange is a CFP^{CM} professional.

Incorrect Use: (as first use in printed materials)

Simon Lim is a CFP professional specialising in estate planning.

3.3 The "CFP" Acronym mark must not be used as a parenthetical abbreviation for CERTIFIED FINANCIAL PLANNER (see also Rule 4.3).

Correct Use:

Greta Lange is a CERTIFIED FINANCIAL PLANNER^{CM} or CFP^{CM} practitioner.

Incorrect Use:

Simon Lim is a CERTIFIED FINANCIAL PLANNER^{CM} (CFP) professional.

3.4 The "CFP" Acronym mark must be used as a descriptive adjective, not as a noun or a verb, except when used within a signature block, on letterhead or on a business card.

Trademark law requires that a mark be used as a descriptive adjective, not as a noun or verb, to prevent the mark from becoming generic. An exception applies when the "CFP" Acronym mark is used following an individual's name, e.g., Simon Lim, CFP^{CM}.

Correct Use:

Simon Lim is a CFP^{CM} professional. He practices financial planning as a CFP^{CM} certificant.

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Correct Use: (Following Practitioner's Name)
Greta Lange, CFP^{CM} Lange Financial Services

Incorrect Use:
Simon Lim is a CFP. He practices financial planning as a CFP.
Simon Lim, cfp Lim Financial Services

3.5 The "CFP" Acronym mark may not be used as a plural or possessive word.

Correct Use:
Greta Lange and Simon Lim are CFP^{CM} professionals.
The CFP professionals' seminar was sold out.

Incorrect Use:
Greta Lange and Simon Lim are CFPs.
The CFPs' seminar was sold out.

3.6 The "CFP" Acronym mark should be used exclusively with the approved nouns: certificant, certification, credential, designation, exam/examination, mark, practitioner and professional.

Correct Use:
Simon Lim is a CFP^{CM} practitioner.
Greta Lange is a CFP^{CM} professional who got her CFP^{CM} certification this year.

Incorrect Use:
Simon Lim is a CFP financial adviser.
Greta Lange got her CFP degree.

4. Requirements for Using the CERTIFIED FINANCIAL PLANNER^{CM} Mark

- Always use capital letters to distinguish the mark from surrounding text.
- Always use the ^{CM} symbol (see section 10.0).
- Always use with one of FPSB Ltd.'s approved nouns: certificant, certification, credential, designation, exam/examination, mark, practitioner and professional.

4.1 The CERTIFIED FINANCIAL PLANNER^{CM} mark must appear in all capital letters or in large and small capital letters.

Correct Use:
Simon Lim is a CERTIFIED FINANCIAL PLANNER^{CM} professional.
Simon Lim is a CERTIFIED FINANCIAL PLANNER^{CM} professional.

Incorrect Use:
Simon Lim is a Certified Financial Planner professional.

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4.2 The CERTIFIED FINANCIAL PLANNER^{CM} mark must appear with the appropriate superscript symbol (see section 10.0) for the territory in which the mark is being displayed in its first use in printed materials.

Correct Use: (as first use in printed materials)

Her clients like working with a CERTIFIED FINANCIAL PLANNER^{CM} practitioner.

Incorrect Use: (as first use in printed materials)

Her clients like working with a CERTIFIED FINANCIAL PLANNER practitioner.

4.3 The CERTIFIED FINANCIAL PLANNER^{CM} mark must not be used as a parenthetical abbreviation for "CFP" (see also Rule 3.3).

Correct Use:

Greta Lange is a CFP^{CM} or CERTIFIED FINANCIAL PLANNER^{CM} practitioner.

Incorrect Use:

Simon Lim is a CFP^{CM} (CERTIFIED FINANCIAL PLANNER) professional.

4.4 The CERTIFIED FINANCIAL PLANNER^{CM} mark must always be used as a descriptive adjective, not as a noun or verb.

Correct Use :

Simon Lim is a CERTIFIED FINANCIAL PLANNER^{CM} professional.

Simon Lim CERTIFIED FINANCIAL PLANNER^{CM} professional Lim Financial Services

Incorrect Use:

Simon Lim, CERTIFIED FINANCIAL PLANNER^{CM} Lim Financial Services

Mary Murphy provides certified financial planning.

4.5 The CERTIFIED FINANCIAL PLANNER^{CM} mark cannot be used as a plural or possessive word.

Correct Use:

Simon Lim and Greta Lange are CERTIFIED FINANCIAL PLANNER^{CM} professionals.

The CERTIFIED FINANCIAL PLANNER^{CM} professionals' seminar was sold out.

Incorrect Use:

Simon and Greta are CERTIFIED FINANCIAL PLANNERS.

The CERTIFIED FINANCIAL PLANNERS' seminar was sold out.

4.6 The CERTIFIED FINANCIAL PLANNER^{CM} mark should be used exclusively with the approved nouns: certificant, certification, credential, designation, exam/examination, mark, practitioner and professional.

Correct Use:

Simon Lim, CERTIFIED FINANCIAL PLANNER^{CM} professional

He has the CERTIFIED FINANCIAL PLANNER^{CM} certification.

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Incorrect Use:

Simon Lim, CERTIFIED FINANCIAL PLANNER^{CM} adviser

He completed the CERTIFIED FINANCIAL PLANNER course.

5. Requirements for Using the Logo Mark

- Always use the three components of the logo – flame, “CFP” and the ^{CM} symbol.
- Always reproduce the logo mark from original artwork.
- Never alter or modify the logo mark.

5.1 The CFP Logo mark in New Zealand is comprised of three components: the flame element, the letters “CFP” and the ^{CM} symbol (note: other symbols apply in other territories). These three components must be used together as one unit at all times to protect the visual integrity of the mark.

Correct Use:  CFP^{CM}

Incorrect Use:

Any deviation from the three components above is a misuse and is unacceptable use.

5.2 All reproduction of the CFP Logo mark must be made from original reproduction artwork provided by FPSB.

Correct Use:  CFP^{CM}

Incorrect Use:

Do not use without the appropriate territory-specific symbol. Do not use without the flame. Do not use the flame alone. Do not separate the graphic elements. Do not add other elements. Do not re-proportion the elements. Do not reproduce the mark in unapproved colours. Do not reproduce the mark on complex backgrounds.

5.3 Under no circumstances may the CFP Logo mark be altered, modified or hand drawn, nor may it be typeset, reproduced or electronically scanned in such poor quality as to distort or significantly alter its appearance.

Correct Use:  CFP^{CM}

Incorrect

Use:

Do not use poor quality reproduction art. Do not try to recreate the mark. Do not skew or distort the mark. Do not use the mark in outline form.

5.4 The CFP Logo mark must be clearly associated with the individual certified by the Institute.

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Correct Use



Incorrect Use



6. Rules for Reproducing the Logo Mark

To control the quality of the CFP Logo mark's appearance, FPSB Ltd. requires all reproductions to be made from original artwork, be readable, legible and on approved backgrounds, and have consistent use of colour. The information below will provide your print vendor the information necessary to create proper reproductions of the mark.

6.1 Original Artwork

All reproductions of the CFP Logo mark must be made from original artwork provided by the Institute. To obtain positive and reverse reproduction images from us, email info@ifa.org.nz.

6.2 Readability

To maintain readability of the trademark symbol (see section 10), the following three graphic relationships between the mark and the trademark symbol have been developed. Contact the institute for more details.



6.3 Legibility

The impact and legibility of the printed CFP Logo mark will be lessened by crowding it with other visual elements. A clear zone surrounding the mark has been established as an area into which no other graphic imagery or other visual elements may enter. This space is determined by the cap height of "CFP," the typographic element of the CFP Logo mark. The one exception to this rule is when the mark is used within text.

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Clear Zone



To ensure optimum legibility of the CFP Logo mark, a minimum reproduction size of 6 mm 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 CFP Logo mark cannot be guaranteed when reproduced at 6 mm, a larger size may be necessary.

6.4 Approved Backgrounds

The positive mark should be used on light coloured backgrounds ranging from white to values no darker than 40% of black. The CFP Logo mark should be reversed if used on dark backgrounds from 50%–100% value of black.


6.5 Colour Options

Consistent use of colour in the mark is important to establish immediate recognition of individuals certified by an FPSB Affiliate. The required two-colour option for the mark uses PANTONE[®] 280 Blue for the flame element and black for the “CFP” and ^{CM} trademark symbol.

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7. Using the CFP^{CM} Marks on Promotional Materials

The CFP^{CM}, CERTIFIED FINANCIAL PLANNER^{CM} and  CFP^{CM} marks may be used on promotional materials provided the following requirements are met:

- 7.1 Use the CFP Marks as described in this guide. Merchandise authorised by the Institute is the only case where some exceptions to these rules may apply.
- 7.2 Link the CFP Marks clearly to an individual or group of individuals certified by the Institute—promotional materials may not contain the CFP Marks alone. FPSB Ltd.'s publications, which make reference to the CFP certification in general, are one of the exceptions to this rule.
- 7.3 Note the date of the promotion.
- 7.4 Refer to the Institute/FPSB Branded Merchandise Policy for guidelines on resale of promotional items.
- 7.5 Use the CFP Marks only on promotional items that are in good taste and that do not degrade the marks.
- 7.6 Use only original artwork to reproduce the CFP Logo mark.

8. Using the CFP^{CM} Marks in Text Documents

- 8.1 Use the CFP Marks as described in this guide.
- 8.2 Only the first use of each mark needs the appropriate trademark symbol (see section 10).
 - Correct Use:
 - Greta Lange recently attained the CERTIFIED FINANCIAL PLANNER^{CM} certification.
 - She works with another CFP^{CM} professional in Auckland.
 - They consider the CFP^{CM} certification to be financial planning's gold standard.
- 8.3 Include the correct New Zealand--specific legal notice (see section 10).
- 8.4 Identify FPSB Ltd. as the owner of the CFP Marks.
- 8.5 Do not alter or modify the CFP Marks.

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9. Using the CFP^{CM} Marks in Electronic Media

Web sites

9.1 Use the CFP Marks as described in this guide.

9.2 In the content of each individual Web site page, only the first use of each mark needs the proper trademark symbol (see section 10).

9.3 The CFP^{CM} and CERTIFIED FINANCIAL PLANNER^{CM} marks should appear only once in the meta-text of the code within each Web site page belonging to an individual currently certified by the Institute.

Correct Use:

<META name "keywords" content = "CERTIFIED FINANCIAL PLANNER">

Incorrect Use:

<META name "keywords" content = "CFP, CFP, CFP, CFP">

<META name "keywords" content = "CERTIFIED FINANCIAL PLANNER, CERTIFIED FINANCIAL PLANNER, CERTIFIED FINANCIAL PLANNER">

9.4 The CFP^{CM} and CERTIFIED FINANCIAL PLANNER^{CM} marks may be used as Web site hyperlinks only if they link directly to FPSB's Web site, www.fpsb.org.

Domain Names

9.5 The CFP^{CM} and CERTIFIED FINANCIAL PLANNER^{CM} marks may not be used as part of a domain name. They may appear as text or images throughout the Web site, according to FPSB's rules for proper use.

Correct Use:

www.simonlimfinancialplanning.co.nz

Incorrect Use:

www.simonlimcfp.co.nz

E-mail Addresses

9.6 The CFP^{CM} and CERTIFIED FINANCIAL PLANNER^{CM} marks may not be used as part of an e-mail address.

Correct Use:

slim@hotmail.co.nz

Incorrect Use:

Simon_Lim@CFP4U.co.nz

cfp@simonlimfinancialplanning.co.nz

10. FPSB's Territory-Specific Trademark Symbols and Legal Notices

To claim ownership in those regions where Affiliates use the marks, FPSB Ltd. relies upon FPSB Affiliates to notify the public of FPSB Ltd.'s ownership of the CFP Marks outside the United States. As each organization creates new materials, or updates and reprints old ones, it should incorporate the new tagline shown on the attached table. Affiliates should make appropriate changes to their Web sites as soon as possible.

In New Zealand the marks are used as follows:

CFP: CM

Wordmark: CM

Logo: CM

Legal notice:



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