



FINANCIAL PLANNING STANDARDS BOARD INDIA

CFP Marks Usage Guide

For


CFP^{CM} Certificants

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For more information please refer to our website www.fpsbindia.org or FPSB's website www.fpsb.org

CFP Marks usage

CFP Marks enforcement is consistent with the efforts of FPSB, US globally in their mission to benefit and protect the public. The CFP^{CM} marks owned by FPSB Ltd., US and administered and monitored within India by FPSB India stand for a globally accepted competency level, ethics and professional practice standards in order to protect the public and other stakeholders in Financial Planning. It is important that the CFP^{CM} Marks do not fall into common use. If the marks fall into common use, the public may not be able to differentiate a personal financial planner who has completed FPSB India's rigorous certification requirements from the one who has not.

In India, Financial Planning Standards Board India (FPSB India) is the CFP Marks licensing authority through an agreement with the FPSB, Denver (U.S.). CFP^{CM}, CERTIFIED FINANCIAL PLANNER^{CM}, and  are owned by Financial Planning Standards Board Ltd. (FPSB) outside the United States. FPSB India prescribes the usage of these marks in their correct perspective in soft content as well as in printed material, as per the guidelines given below. The **CORRECT** usages are highlighted in a **BLUE** color, whereas **INCORRECT** usages are highlighted in **RED** colour.

1. Kindly use "**Financial Planning Standards Board India**" or "**FPSB India**" or "**FPSBI**" when referring to the Indian Affiliate to distinguish from FPSB Ltd., FPSB (USA) which is the Principal Body.

For instance, **incorrect** usages when referring to FPSB India, could be

Financial Planning Standards Board
Financial Planning Standards Board of India
Financial Planning Standards Board (FPSB), India
Financial Planning Standards Board, India
Financial Planning Standards Board India (FPSB)
etc.

2. Kindly use the following tagline in all content/s wherever a reference is made to CFP^{CM} Marks or to FPSB India:

CFP^{CM}, CERTIFIED FINANCIAL PLANNER^{CM} and  are certification marks owned outside the U.S. by Financial Planning Standards Board Ltd. Financial Planning Standards Board India is the marks licensing authority for the CFP Marks in India, through agreement with FPSB.

3. Always use CFP in capital letters and without periods between letters, and with the symbol CM in superscript, as in **CFP^{CM} Certification**, **CFP^{CM} Certificant**, **CFP^{CM} Professional**

For instance, **incorrect** usages could be
CFPCM **C F P** **C.F.P.** **cfp**

4. Always use CFP^{CM} as an adjective instead of a noun, e.g. always use **CFP^{CM} Certification, CFP^{CM} Certificant, CFP^{CM} Professional, CFP^{CM} Practitioner** or **CFP^{CM} Mark**.

These are five approved noun usages with CFP^{CM} Marks.

Incorrect usages are **CFP advisor, CFP course, CFP program**, etc.

Correct usages are **CFP^{CM} professional, CFP^{CM} Certification course, CFP^{CM} Certification program**

5. Never use CFP^{CM} as standalone noun but it can be used as an acronym to qualify a noun, as in **A N Sharma, CFP^{CM}**.
6. Always use **CERTIFIED FINANCIAL PLANNER^{CM}** in capitals followed by Certification, Certificant, Practitioner, Professional, Mark as mentioned above. It should always be used as a descriptive adjective.

Incorrect usages could be **Certified Financial Planner, certified financial planner**

7. Kindly **do not use plurals** as in **CERTIFIED FINANCIAL PLANNERS** or **CFPs**.

The correct usages are

CERTIFIED FINANCIAL PLANNER^{CM} Professionals

CFP^{CM} Practitioners.

The **incorrect** usages could be **CFPs, CFP's, CFPs'**

8. Kindly do not use CERTIFIED FINANCIAL PLANNER^{CM} as a parenthetical abbreviation for CFP^{CM} or vice versa.
For instance, **Incorrect** use could be


CERTIFIED FINANCIAL PLANNER^{CM} (CFP^{CM})

CFP^{CM} (CERTIFIED FINANCIAL PLANNER^{CM})

The correct usage is

CFP^{CM} or CERTIFIED FINANCIAL PLANNER^{CM} Professional.

9. The CFP^{CM} flame logo must always be reproduced from original artwork with proper compliance for the three components, viz. the 'flame', the acronym 'CFP' and the 'symbol' in appropriate color, size and background specifications as elaborated on our website www.fpsbindia.org.

10. The consistent use of color in the mark is important to establish immediate recognition of individuals certified by an FPSB Affiliate. The logo should be legible, should not be compressed or stretched and should not be in any color other than **PANTONE® 280 Blue** for the **flame** element and **Black** for the 'CFP'.
11. The form of the CFP^{CM} Marks shall 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.
12. The CFP^{CM} Certificant will not adopt, use or promote any mark that is confusingly similar to any of the CFP^{CM} Marks.
13. The CFP^{CM}, CERTIFIED FINANCIAL PLANNER^{CM} and  Marks may be used on promotional materials provided the following requirements are met:
 - (i) Link the Marks clearly to an individual or group of individuals certified by FPSB India. Promotional materials may not contain the CFP^{CM} Marks alone.
 - (ii) Use the Marks only on promotional items that are in good taste and that do not degrade the marks.
 - (iii) Use only original artwork to reproduce the CFP^{CM} logo mark.
 - (iv) Identify FPSB, Denver, US as the owner of the Marks. (Kindly see Item 2 above)
 - (v) Do not alter or modify the Marks.
14. **Domain names:** The CFP^{CM} or CERTIFIED FINANCIAL PLANNER^{CM} marks may not be used as part of a domain name. They may appear as text or images throughout the website, in accordance with FPSB or FPSB India's rules for proper use.

For instance, incorrect use is www.rameshcfp.com
The correct use can be www.rameshfinancialplanning.com

15. **E-mail Addresses:** The CFP^{CM} and CERTIFIED FINANCIAL PLANNER^{CM} marks may not be used as part of an e-mail address by either the education Providers or any of their students, staff, faculty, directors, etc.

For instance, **incorrect** usages are ramesh@cfp.com
ramesh@cfpcf.com, rameshs@cfp4u.com, etc.

16. CFP^{CM} Certificants of FPSB India acknowledge that FPSB, Denver, US is the sole, absolute and exclusive owner of all rights, title and interest in, and to, the CFP Marks outside the United States.
17. CFP^{CM} Certificants of FPSB India will not challenge the validity of the CFP Marks.

The CFP^{CM} Certificants are required to follow the guidelines for the usage of CFP^{CM} Marks on their business cards and other stationery in manner as detailed in this document. Any usage of Marks or logo other than the specified usages shall be treated as infringement/unauthorized usage/Misuse of the CFP^{CM} Marks.