



Proper use of the CFP, CERTIFIED FINANCIAL PLANNER and  CFP^{CM} marks (“CFP Marks”) is important to protecting their integrity and legal status.

General Rules and Acknowledgements

- CFP professionals acknowledge, and will not challenge, that FPSB Ltd. is the sole, absolute and exclusive owner of all rights, title and interest in, and to, the CFP^{CM}, CERTIFIED FINANCIAL PLANNER^{CM} or  CFP^{CM} (the CFP Marks) outside the United States, including in India.
- CFP professionals will not challenge the validity of the CFP Marks.
- CFP professionals will not adopt, use or promote any mark that is confusingly similar to any of the CFP Marks.
- CFP professionals will not take, encourage or promote any action that could or does impair the rights of FPSB Ltd. in the CFP Marks or use the CFP Marks in a way that would make it difficult for FPSB to assert its ownership of them.
- The CFP marks may only be used to truthfully represent the certified status of an individual, and may not be used as part of the name of a business or company.

CFP Mark

- **Always** use capital letters and without periods in between the letters, CFP.
- **Always** use the appropriate trademark symbol (“CM”).
- **Never** use as a parenthetical abbreviation for the CERTIFIED FINANCIAL PLANNER designation.
- **Always** use as a descriptive adjective, not as a noun or verb, except when used following your name (for example in a signature block).
- **Always** use with one of FPSB Ltd.’s eight approved nouns: certificant, certification, credential, designation, exam/examination, mark, practitioner and professional (except if used following your name).
- **Never** use as a plural or possessive word (i.e. Never: CFPs).

Correct Use Example(s): Raj Patel is a CFP^{CM} professional. Nishi Gupta, CFP^{CM}

CERTIFIED FINANCIAL PLANNER Mark

- **Always** use all capital letters (or large and small capital letters) to distinguish the mark from surrounding text.
- **Always** use the appropriate trademark symbol (“CM”).
- **Always** use as a descriptive adjective, not as a noun or verb.
- **Always** use with one of FPSB Ltd.’s eight approved nouns: certificant, certification, credential, designation, exam/examination, mark, practitioner and professional.
- **Always** associate it with the individual certified by FPSB Ltd.
- **Never** use as a plural or possessive word (i.e. Never: Certified Financial Planning).

Correct Use Example(s): Raj Patel is a CERTIFIED FINANCIAL PLANNER^{CM} professional. Nishi Gupta and Raj Patel are CERTIFIED FINANCIAL PLANNER^{CM} practitioners.

CFP Logo Mark

- **Always** use the three components of the logo – flame, “CFP” and appropriate trademark symbol (“CM”) – together as one unit to protect the visual integrity of the mark.
- **Always** use original artwork provided by FPSB Ltd. To ensure optimum legibility, a minimum reproduction size of 6 mm is recommended.
- **Always** associate with the individual certified by FPSB Ltd.
- **Never** alter or modify the logo (for example by using different colors).

Correct Use Example(s):   CM Raj Patel.

FPSB Ltd.’s Trademark Tagline

If you use the CFP Marks on your website or in promotional materials include the following trademark ownership tagline:

“Financial Planning Standards Board Ltd. (FPSB Ltd.) is the proprietor of the CFP^{CM}, CERTIFIED FINANCIAL PLANNER^{CM} and   CM marks outside the United States, including in India, and permits qualified individuals to use these marks to indicate that they have met FPSB Ltd.’s initial and ongoing certification requirements.”

Social / Electronic Media

- The CFP Marks may not be used as part of your domain name, website URL, email address or social media handle, but you may display your CFP certification (and your digital credential) within your social media profile.
- The CFP and CERTIFIED FINANCIAL PLANNER marks may be used as website hyperlinks only if they link directly to FPSB Ltd.'s website, india.fpsb.org.