


## INTRODUCTION

The CFP<sup>CM</sup> marks are designed to readily identify CFP<sup>CM</sup> professional to the public and to clearly distinguish between CFP<sup>CM</sup> professional and other Financial Planners. They are international marks owned outside the U.S. by Financial Planning Standards Board Ltd. (FPSB Ltd.). Financial Planning Standards Board India is the marks licensing authority for the CFP<sup>CM</sup> marks in India, through agreement with FPSB Ltd..

The mark has three components. They are the , the letter mark, "CFP<sup>CM</sup>" and the word mark, "CERTIFIED FINANCIAL PLANNER<sup>CM</sup>."

Anyone licensed by FPSB India can use these marks on business cards, letterhead, advertising, etc. It is not necessary that every CFP<sup>CM</sup> professional redesign their stationery immediately as the CFP<sup>CM</sup> certificate provided by FPSB India readily identify the individual planner as a CFP<sup>CM</sup> professional.

However, FPSB India promotes these marks on its brochures, website and other advertising and marketing materials. You will find these distinctive marks to be an effective way to convey that you have completed all the CFP<sup>CM</sup> certification requirements and satisfy the ongoing post-certification requirements.

This guide is designed to help CFP<sup>CM</sup> professional with the proper use of the marks. It is important to know that FPSB India licenses individuals; it does not license firms, partnerships, corporations, etc. The public should be aware that the CFP<sup>CM</sup> Certification credential reflects an individual's qualifications, and the design of the letterhead or business card should indicate this. Examples of the correct and incorrect use of CFP<sup>CM</sup> mark with flame design, the letter CFP<sup>CM</sup> mark and the word mark, CERTIFIED FINANCIAL PLANNER<sup>CM</sup>, follow.

## MARKS ONLINE USE GUIDE

If you are currently using any of the CFP<sup>CM</sup> flame design logo, CFP<sup>CM</sup> and/or CERTIFIED FINANCIAL PLANNER<sup>CM</sup> ("Marks") on your website, please make sure they are used in conformity with this guide.

1. The marks CFP<sup>CM</sup> and CERTIFIED FINANCIAL PLANNER<sup>CM</sup> may appear once in the meta-tags of each Web page belonging to an individual currently certified by FPSB India.
2. The CFP<sup>CM</sup> and CERTIFIED FINANCIAL PLANNER<sup>CM</sup> marks may not be used in a domain name. They may be used to identify a page on the website as follows:

Correct

[www.company.com/financialplanning/cfp](http://www.company.com/financialplanning/cfp)

Incorrect

[www.CFP4u.com](http://www.CFP4u.com)


[www.AlokKumarCFP.com](http://www.AlokKumarCFP.com)


[www.financial.com/cfpeducation](http://www.financial.com/cfpeducation)

3. The CFP<sup>CM</sup>, CERTIFIED FINANCIAL PLANNER<sup>CM</sup> and  Marks may be used as hyperlinks on an individual's website if they link directly to FPSB India's home page ([www.fpsbindia.org](http://www.fpsbindia.org))

4. The CFP<sup>CM</sup>, CERTIFIED FINANCIAL PLANNER<sup>CM</sup> and  marks must be clearly linked to the individual certified by FPSB India.

5. The first use of CFP<sup>CM</sup> and CERTIFIED FINANCIAL PLANNER<sup>CM</sup> within the website content on each web address (URL) requires the marks symbol (CM).

6. The following tagline must be used when featuring the CFP<sup>CM</sup>, CERTIFIED FINANCIAL PLANNER<sup>CM</sup> or  marks (other than in connection to a CFP<sup>CM</sup> professional (i.e. Alok Kumar, CFP<sup>CM</sup>) in website content on each URL.

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If you have specific questions regarding use of the Marks on your website or would like us to review your website for proper use, please contact FPSB India directly.

## CFP<sup>CM</sup> LOGO DESIGN CORRECT USAGE


### CERTIFICATION MARK



This certification mark is a highly distinctive visual symbol that certifies an individual CFP<sup>CM</sup> professional has completed the education, examination and work experience requirements of FPSB India, and has agreed to adhere to its Code of Ethics and other post-certification requirements in the field of personal Financial Planning. This certification mark is authorized for use only by individuals who are currently licensed by FPSB India. It cannot be used as part of an individual's title or as a statement of academic degree, nor can it be used as a corporate identification for any company or organization, or integrated into corporate logos.

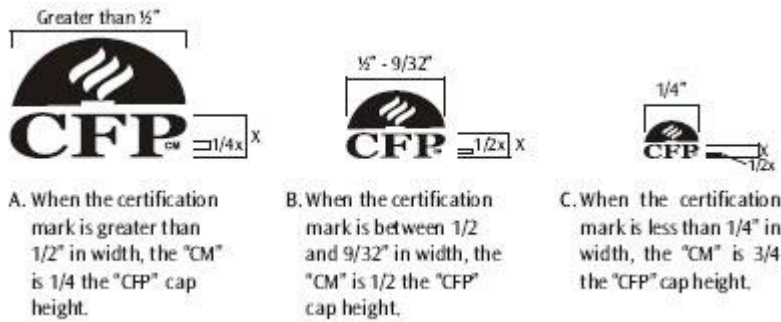
The certification mark is comprised of two graphic components: the flame element and the letter CFP<sup>CM</sup> mark. These components must be used together at all times. They may not be altered, modified, hand-typeset, scanned or used independently from one another in any circumstances. To ensure that the certification mark appears only in its approved form, all reproduction of the certification mark must be made from electronic files obtained from FPSB India, Contact [info@fpsbindia.org](mailto:info@fpsbindia.org)

### TAG LINE

 , CERTIFIED FINANCIAL PLANNER<sup>CM</sup> and CFP<sup>CM</sup> are certification marks owned outside the U.S. by Financial Planning Standards Board Ltd. (FPSB). Financial Planning Standards Board India is the marks licensing authority for the CFP<sup>CM</sup> marks in India, through agreement with FPSB.

### RELATIONSHIP TO CERTIFICATION MARK

To maintain readability of the registered symbol, three graphic relationships between the CFP<sup>CM</sup> certification mark and the registered symbol "CM" have been developed.



## Colour Guidelines for CFP™ mark with Flame Design

Consistent use of colour in the certification mark presentation is important in establishing immediate recognition of CFP™ professionals. The mark can be printed in any colour darker than 50% value of black, but the CFP™ mark and flame design should be all one colour or the flame design can be printed in a corporate colour and the CFP™ mark printed in black. Do not use garish colours and do not add a third colour.

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

Any special techniques such as embossing or foil stamping must be approved by FPSB India prior to production.

## CFP™ LOGO DESIGN LEGIBILITY AND INCORRECT USAGE

**Legibility:** The impact and legibility of the printed certification 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, typography or visual elements may enter. As shown in the example below, the unit of measurement used to define this space is determined by the cap height of "CFP," the typographic element of the certification mark.

To ensure optimum legibility of the certification mark, a minimum reproduction size of 1/4" is recommended. If reduced to a smaller size, the overall legibility and visual impact of the certification mark will be severely compromised. If reproduction quality of the certification mark can't be guaranteed when reproduced at 1/4", a larger size may be necessary. The recommended minimum size would generally be reserved for business cards or other stationery items.

**Use and Misuse:** The visual integrity of the certification mark must be protected against unauthorized applications and misuse. Under no circumstances may the certification mark be placed in such a way that it appears to be a part of a company's name or of an individual's title or degree. Avoid these or any other uses that do not clearly follow the guidelines set forth in this usage guide or have not been approved by FPSB India. Other misuse of the certification mark could involve altering reproduction artwork, independent use of the flame element without the use of the typographic "CFP" element or any number of other similar violations.

Shown are several examples that constitute violations of graphic or correct usage standards; however, this is not an exhaustive list. Please direct any questions about use of the certification mark to FPSB India at [info@fpsbindia.org](mailto:info@fpsbindia.org)

**MINIMUM  
CLEAR ZONE**



**MINIMUM  
REDUCTION SIZE**



**MISUSE OF CERTIFICATION MARK**



Do not all other elements.



Do not use the flame alone.



Do not re-proportion the elements.



Do not separate the graphic element with contrasting background.



Do not reproduce the certification mark on complex backgrounds.



Do not use the poor quality reproduction art or electronic scans.



Do not use the certification mark as a company logo.



Do not combine the certification mark with a company logo.



Do not position the certification mark in close proximity to a company logo.



Do not use the certification mark as a part of a personalisation, degree or title.

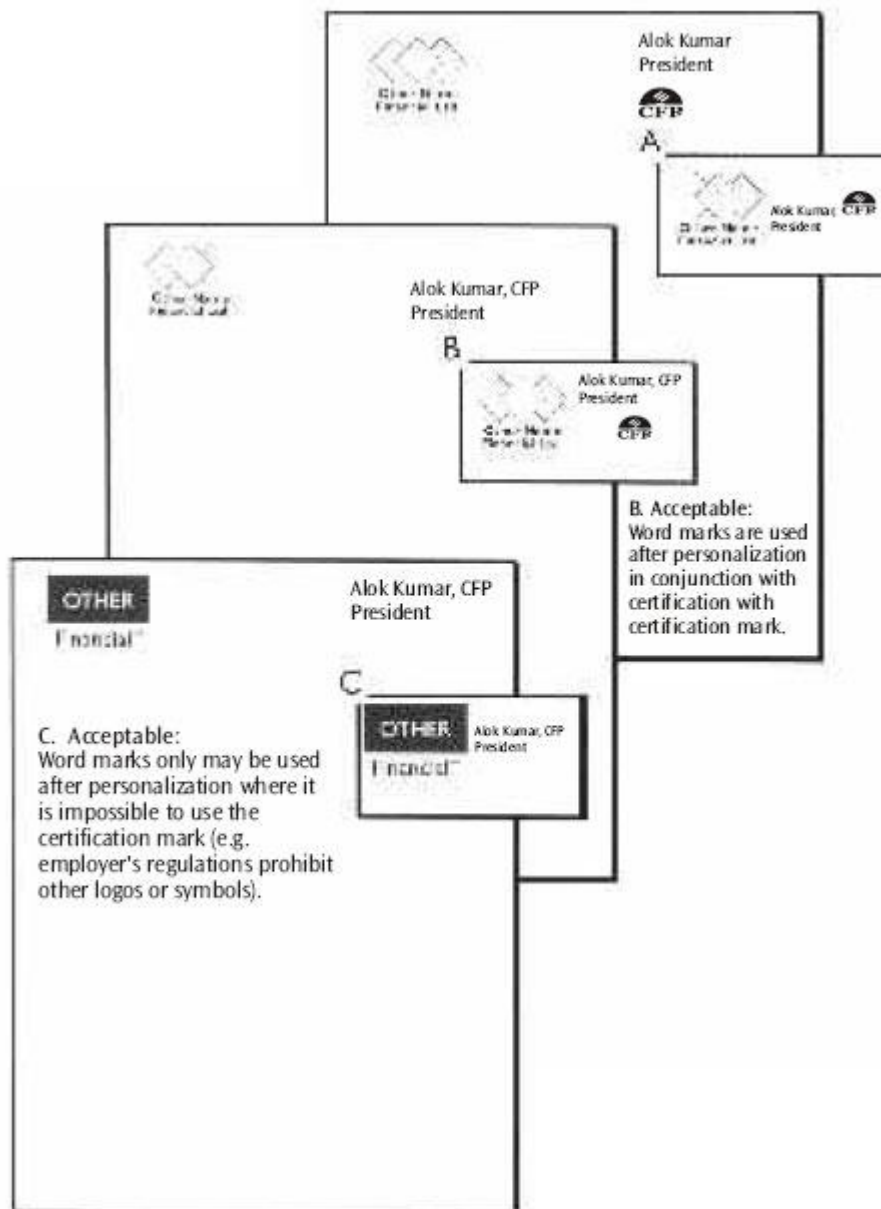
**STATIONERY APPLICATIONS**

To help CFP<sup>CM</sup> professionals design printed business materials that incorporate the marks, approved uses of the certification mark are shown below in various applications. Individual CFP<sup>CM</sup> professionals are authorized and encouraged to use the certification mark on their personal stationery (letterheads, business cards, envelopes, mailing labels), promotional literature, advertising and signage. Permission to use the certification mark in any other applications must be obtained from FPSB India prior to reproduction.

The certification mark can be correctly used in a number of ways in a variety of print applications. The examples below are not intended to be mandatory design requirements for formatting business cards and letterheads of CFP<sup>CM</sup> professionals. However, they illustrate how to display the certification mark with a generous amount of clear space, enhancing certification mark recognition and visual impact. In all instances, the certification mark's positioning must comply with the minimum clear zone distances requirements.

The preferred placement of the certification mark on personal stationery items is in close proximity to the

CFP<sup>CM</sup> professional's personalization so it obviously relates to the CFP<sup>CM</sup> professional's name, but is not an actual part of the personalization. (see example A) Use of the CFP<sup>CM</sup> mark and CERTIFIED FINANCIAL PLANNER<sup>CM</sup> marks alone on personal stationery, promotional literature, advertising and signage is allowed but is not preferred use. It is acceptable to use the word marks in addition to the certification mark (see example B) or without the certification mark where it is impossible to reproduce the certification mark due to corporate regulations, etc. (see example C)



## ABOUT CFP<sup>CM</sup> AND CERTIFIED FINANCIAL PLANNER<sup>CM</sup> MARKS

The CFP<sup>CM</sup> and CERTIFIED FINANCIAL PLANNER<sup>CM</sup> marks serve to identify those individuals who meet current certification and post-certification requirements of FPSB India.

## **GUIDELINES FOR THE USE OF CFP<sup>CM</sup> AND CERTIFIED FINANCIAL PLANNER<sup>CM</sup> MARKS**

1. The CFP<sup>CM</sup> and CERTIFIED FINANCIAL PLANNER<sup>CM</sup> marks must not be used generally. Such misuse occurs when the marks are used as nouns; correct usage requires that they must be used as adjectives. The acceptable nouns are mark, certificant, certification, professional, practitioner, credential, designation, exam/examination. Also be on the alert for generic usage that occurs when a mark is used as a common name. For instance, references to all colas as Cokes or the use of the CFP<sup>CM</sup> or CERTIFIED FINANCIAL PLANNER<sup>CM</sup> marks to describe all Financial Planners are considered to be generic and violate approved usage policies.

Correct

He is a CFP<sup>CM</sup> Professional/CERTIFIED FINANCIAL PLANNER<sup>CM</sup>. (i.e. an individual who currently has satisfied all FPSB certification and post-certification requirements)

Incorrect

2. The mark CFP<sup>CM</sup> must appear in all caps, without periods between the letters. It is preferred that the mark CERTIFIED FINANCIAL PLANNER<sup>CM</sup> appear in all caps; however, the first letter of each word may be capitalized as an alternative.

Correct

Alok Kumar, CFP<sup>CM</sup>  
Alok Kumar, CERTIFIED FINANCIAL PLANNER<sup>CM</sup>  
Alok Kumar, Certified Financial Planner

Incorrect

Alok Kumar, C.F.P  
Alok Kumar, cfp  
Alok Kumar, certified Financial Planner

3. CFP<sup>CM</sup> and CERTIFIED FINANCIAL PLANNER<sup>CM</sup> must not be used as part of, or incorporated in, the name of a firm,

Correct

Alok Kumar, CERTIFIED FINANCIAL PLANNER<sup>CM</sup>

Incorrect

Alok Kumar, Inc., Certified Financial Planner  
Alok Certified Financial Planner, Inc.