



Media Guide – Use of the CFP^{CM} Marks and AFPTM Marks





The “Media Guide – Use of CFP Marks and AFP Marks” has been developed to assist mass media in featuring CFP marks and AFP marks in all their stories on print, online, digital and broadcast outlets.

Safeguarding the proper usage of these CFP marks and AFP marks is crucial - unlike government certifications or educational credentials, the CFP marks and AFP marks are common law certification marks and, as such, must be used in compliance with certification mark law. If the marks are used improperly, they can eventually lose their certification mark status. If this were to happen to the CFP marks and AFP marks, the public may not be able to differentiate CFP professionals and AFP professionals who have completed stringent certification process from those who claim themselves as professional financial planners. As such, it is necessary to apply the rules and guidelines in this guide when developing collateral pieces which feature the CFP marks and AFP marks.

The purpose of this guide is to provide the media a quick reference with illustrative examples when working on CFP marks and AFP marks. For enquiries on the marks usage by the media, please contact Marketing and Member Services Department of the Institute of Financial Planners of Hong Kong (IFPHK) at 2982 7888 or via email marketing@ifphk.org.

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Using of CFP^{CM}, CERTIFIED FINANCIAL PLANNER^{CM}, ,
 CERTIFIED FINANCIAL PLANNERTM, AFPTM, ASSOCIATE FINANCIAL PLANNERTM,
 AFP and  ASSOCIATE FINANCIAL PLANNER[®].

- Always use the CM or TM in superscript in text documents, including individual web URLs, its first use.

Correct Use:

- Peter Chan is a CFP^{CM} professional specializing in insurance planning and there are two other CFP professionals working in his office.
- His clients like working with a CERTIFIED FINANCIAL PLANNER^{CM} professional.
- Peter Chan is an AFPTM professional specializing in insurance planning and there are two other AFP professionals working in his office.
- His clients like working with an ASSOCIATE FINANCIAL PLANNERTM professional.

- Always use capital letters and without periods between letters.

Correct Use:

- Peter Chan, CFP^{CM} or Peter Chan, CERTIFIED FINANCIAL PLANNER^{CM}
- Peter Chan, AFPTM or Peter Chan, ASSOCIATE FINANCIAL PLANNERTM

- The CFP marks and AFP marks should not be used as a parenthetical abbreviation for the CERTIFIED FINANCIAL PLANNER^{CM} mark and ASSOCIATE FINANCIAL PLANNERTM mark, or vice versa.

Correct Use:

- Peter Chan, CFP^{CM} or Peter Chan, CERTIFIED FINANCIAL PLANNER^{CM}
- CERTIFIED FINANCIAL PLANNER^{CM} professional
- Peter Chan, AFPTM
- ASSOCIATE FINANCIAL PLANNERTM professional

- The CFP^{CM} mark, CERTIFIED FINANCIAL PLANNER^{CM} mark, AFPTM mark and ASSOCIATE FINANCIAL PLANNERTM mark must be used with the approved nouns: “certification” [資格認證], “certificant” [持證人], “professional” [專業人士], “practitioner” [執業人士], “mark” [認證標誌 / 商標] and exam/examination [考試].



- Always use “The Institute of Financial Planners of Hong Kong”, “IFPHK” or “香港財務策劃師學會” when referring to the marks licensing authority for CFP marks and AFP marks in Hong Kong and Macau, through agreement of Financial Planning Standards Board Ltd. (FPSB).

Color Pantone and Artwork

- Always use original artwork provided by the IFPHK. To obtain positive and reverse reproduction images, contact us at marketing@ifphk.org.
- The CFP marks and AFP marks are comprised of three components – the flame element, the letter CFP / CERTIFIED FINANCIAL PLANNER or AFP / ASSOCIATE FINANCIAL PLANNER, and the symbol of CM or TM in superscript. These three components should be used together as one unit at all times to protect the visual integrity of the marks.

Correct use



CERTIFIED FINANCIAL PLANNER™
Blue – PMS 280
Black



ASSOCIATE FINANCIAL PLANNER®
Blue – PMS 280
Black

Color Pantone (IFPHK Logo, CFP Marks and AFP Marks)



Blue – Pantone 294C
Light blue – 70% of the Pantone blue
Grey – Pantone 7544C
Orange – Pantone 144C



Blue – PMS 280
Black

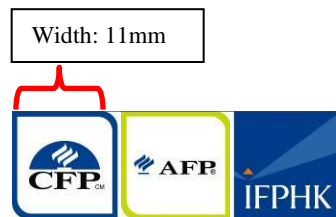


Blue – PMS 280
Green – PMS 382
Black



Blue – Pantone 294C
Light blue – 70% of the
Pantone blue
Orange – Pantone 144C

Use of Logos



Users are advised to use the 3-in-1 logo, as shown above.

- The CFP marks and AFP marks must be clearly associated with the individuals certificated by the IFPHK.
- Under no circumstances may the CFP marks and AFP marks 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.
- The form of the CFP marks and AFP 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.
- Under no circumstance that the media can challenge the validity of the CFP Marks and AFP marks.

For any media enquiries about the mark usage, please contact the Marketing and Member Services Department of the IFPHK, Tel: 2982 7888 / marketing@ifphk.org.