



Guide to Use of the CFP® Marks

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Should there be any discrepancy between the English and Chinese versions of this “Guide to Use of the CFP® Marks”, the English version shall prevail.

Latest Update: October 2020



香港財務策劃師學會
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Introduction

Financial Planning Standards Board Ltd. (“FPSB”) owns the CFP®, CERTIFIED FINANCIAL PLANNER®, CFP®, CERTIFIED FINANCIAL PLANNER®, AFP®, ASSOCIATE FINANCIAL PLANNER®, AFP and ASSOCIATE FINANCIAL PLANNER® marks (“CFP marks” and “AFP marks”), and oversees the development of international CFP certification and AFP certification standards to benefit and protect consumers outside the United States.

By meeting and maintaining FPSB’s licensing and affiliation requirements and standards, The Institute of Financial Planners of Hong Kong (IFPHK) is authorized to administer the CFP certification program in Hong Kong and Macau.

Individuals who have met the IFPHK’s initial certification and renewal standards are authorized to use the following four marks in Hong Kong and Macau:



A person’s use of the above CFP marks identifies that he or she has met rigorous ethics, competency and professional practice standards to deliver personal financial planning services in Hong Kong and Macau, as established by FPSB and locally adapted and administered by the IFPHK in Hong Kong and Macau.

To benefit and protect the public, the IFPHK must ensure that the CFP marks are protected and used properly in Hong Kong and Macau, and that any person using the CFP marks has met appropriate certification requirements. Unlike licenses to practice or educational credentials, the CFP certification and service marks must be used in compliance with trademark law in Hong Kong and Macau.

If trademarks are used improperly, they could eventually lose their protective status. If this were to happen to the CFP marks, CFP professionals would lose the differentiation of the certification and consumers would be unable to rely on the CFP certification as a mark of quality for professional personal financial planning. To prevent this, the IFPHK requires all stakeholders to follow these guidelines for the use of the CFP marks.

Please familiarize yourself with the contents of this Guide before using the CFP marks. If you would like the IFPHK to review materials that you are developing which feature the CFP marks, please contact us at info@ifphk.org.





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1. Rules for Use of the CFP® Marks



- 1.1 The marks CFP®, CERTIFIED FINANCIAL PLANNER®,  and  CERTIFIED FINANCIAL PLANNER® should be used only as described in this guide.
- 1.2 CFP professionals and other IFPHK stakeholders acknowledge that FPSB 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 professionals and other IFPHK stakeholders will not challenge FPSB as the sole, absolute and exclusive owner of all right, title and interest, including the associated goodwill, in the CFP marks outside the United States.
- 1.4 CFP professionals and other IFPHK stakeholders will not challenge the validity of the CFP marks.
- 1.5 CFP professionals and other IFPHK stakeholders will not adopt, use or promote any mark that is confusingly similar to any of the CFP marks, as determined by FPSB.
- 1.6 CFP professionals and other IFPHK stakeholders will not take, encourage or promote any action that would/does impair the rights of FPSB 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 to assert its ownership of the CFP marks outside the United States.
- 1.7 CFP professionals are subject to the conditions relating to use of the CFP marks as set forth in the IFPHK's CFP certification Renewal Application Form, if not included in this guide.
- 1.8 The CFP marks must be used in a way that makes it clear that FPSB owns them. The marks may not be used to imply FPSB's endorsement of an individual or company (even when one or more employees are certified by the IFPHK to use the CFP marks).
- 1.9 The CFP marks may not be used as part of the name of an individual's business or company.
- 1.10 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.



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- 1.11 Where possible, use the Hong Kong and Macau-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®, CERTIFIED FINANCIAL PLANNER®,  and  CERTIFIED FINANCIAL PLANNER® 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.”





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2. General Requirements for Using the CFP® Marks

CFP professionals should follow FPSB and the IFPHK's requirements when using the CFP®, CERTIFIED FINANCIAL PLANNER®,  and  CERTIFIED FINANCIAL PLANNER® marks in communications and collateral materials. You will greatly assist FPSB and the IFPHK in protecting its CFP marks if you follow three general rules that apply to all marks.

2.1 Always Use the CFP® marks as Adjectives

The CFP marks must never be used as nouns, they must always be used as an adjective modifying a noun.

Correct Use:

- I am a CFP® professional.
- My CERTIFIED FINANCIAL PLANNER® 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 the CFP certification standards, they should modify nouns that refer to individuals, the certification program or the marks themselves. There are five approved nouns that can follow the CFP marks – “certificant”, “certification”, “mark”, “practitioner” and “professional”.

Correct Use:

- CFP® professional
- CFP® practitioner
- CERTIFIED FINANCIAL PLANNER® mark

Incorrect Use:

- CFP® firm
- CFP® advertisement
- CERTIFIED FINANCIAL PLANNER® qualification



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3. Requirements for Using the CFP® Mark

- Always use capital letters.
- Never use periods (unless at the end of a sentence, e.g., “I received advice from Simon Lim, CFP®.”).
- Always use the ® superscript symbol.
- Always use with the approved nouns: “certificant”, “certification”, “mark”, “practitioner” and “professional”.

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

Correct Use:

- Simon Lim, CFP®

Incorrect Use:

- Simon Lim, cfp®
- Greta Lange, C.F.P.®

3.2 The CFP® mark must appear with the ® superscript symbol in which the mark is being displayed in its first use in printed materials.

Correct Use: (as first use in printed materials)

- Greta Lange is a CFP® professional.

Incorrect Use (as first use in printed materials):

- Simon Lim is a CFP professional specializing in estate planning.



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3.3 The CFP® mark must not be used as a parenthetical abbreviation for CERTIFIED FINANCIAL PLANNER®.

Correct Use:

- Greta Lange is a CFP® practitioner or CERTIFIED FINANCIAL PLANNER® practitioner.

Incorrect Use:

- Simon Lim is a CERTIFIED FINANCIAL PLANNER® (CFP®) professional.

3.4 The CFP® 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. An exception applies when the CFP mark is used following an individual's name, e.g., Simon Lim, CFP®.

Correct Use:

- Simon Lim is a CFP® certificant.
- Mary Murphy practices financial planning as a CFP® certificant.

Correct Use: (Following Practitioner's Name)

- Greta Lange, CFP®
Lange Financial Services

Incorrect Use:

- Simon Lim is a CFP®.
- He practices financial planning as a CFP®.



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

Correct Use:

- Greta Lange and Simon Lim are CFP® professionals.
- The CFP® professionals' seminar was sold out.

Incorrect Use:

- Simon Lim and Paul Chan are CFPs®.
- The CFP®'s seminar was sold out.

3.6 The CFP® mark should be used exclusively with the approved nouns: “certificant”, “certification”, “mark”, “practitioner” and “professional”.

Correct Use:

- Simon Lim is a CFP® certificant.
- Greta Lange is a CFP® professional who got her CFP certification this year.

Incorrect Use:

- Simon Lim is a CFP® financial advisor.
- Greta Lange has obtained her CFP® degree.



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4. Requirement for Using the CERTIFIED FINANCIAL PLANNER® Mark

- Always use capital letters to distinguish the mark from surrounding text.
- Always use the ® superscript symbol.
- Always use with the approved nouns: “certificant”, “certification”, “mark”, “practitioner” and “professional”.

4.1 The CERTIFIED FINANCIAL PLANNER® mark must appear in all capital letters.

Correct Use:

- Simon Lim is a CERTIFIED FINANCIAL PLANNER® professional.

Incorrect Use:

- Simon Lim is a Certified Financial Planner® professional.

4.2 The CERTIFIED FINANCIAL PLANNER® mark must appear with the ® superscript symbol in its first use in printed materials.

Correct Use:

- Her clients like working with a CERTIFIED FINANCIAL PLANNER® practitioner.

Incorrect Use:

- Her clients like working with a CERTIFIED FINANCIAL PLANNER practitioner.

4.3 The CERTIFIED FINANCIAL PLANNER® mark must not be used as a parenthetical abbreviation for the CFP® mark.

Correct Use:

- Greta Lange is a CFP® practitioner or CERTIFIED FINANCIAL PLANNER® practitioner.

Incorrect Use:

- Simon Lim is a CFP® (CERTIFIED FINANCIAL PLANNER®) practitioner.



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- 4.4 The CERTIFIED FINANCIAL PLANNER® mark must always 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. An exception applies when the CFP mark is used following an individual's name.

Correct Use:

- Simon Lim is a CERTIFIED FINANCIAL PLANNER® professional.

Correct Use (Following Practitioner's Name):

- Simon Lim, CERTIFIED FINANCIAL PLANNER®
Lim Financial Services

Incorrect Use:

- Mary Murphy provides certified financial planning.

- 4.5 The CERTIFIED FINANCIAL PLANNER® mark must not be used as a plural or possessive word.**

Correct Use:

- Simon Lim and Greta Lange are CERTIFIED FINANCIAL PLANNER® professionals.
- The CERTIFIED FINANCIAL PLANNER® professionals' seminar was sold out.

Incorrect Use:

- Simon and Greta are CERTIFIED FINANCIAL PLANNERS®.
- The CERTIFIED FINANCIAL PLANNER®'s seminar was sold out.



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4.6 The CERTIFIED FINANCIAL PLANNER® mark should be used exclusively with the approved nouns: “certificant”, “certification”, “mark”, “practitioner” and “professional”.

Correct Use:

- Simon Lim is a CERTIFIED FINANCIAL PLANNER® professional.
- He has obtained the CERTIFIED FINANCIAL PLANNER® certification.

Incorrect Use:

- Simon Lim is a CERTIFIED FINANCIAL PLANNER® advisor.
- He completed the CERTIFIED FINANCIAL PLANNER® course.



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5. Requirements for Using the and CERTIFIED FINANCIAL PLANNER® Marks

- Always use the three components of the logo – flame, “CFP” or “CERTIFIED FINANCIAL PLANNER” and the superscript symbol (“®”).
- Always reproduce the logo mark from original artwork. You may request for the original artwork file by contacting us at info@ifphk.org.
- Never alter or modify the logo marks.

5.1 The logo mark is comprised of three components: the flame element, the letters “CFP” or the words “CERTIFIED FINANCIAL PLANNER”, and the superscript symbol (“®”). These three components must be used together as one unit at all times to protect the visual integrity of the mark.

Correct Use:



5.2 All reproduction of the  and  CERTIFIED FINANCIAL PLANNER® marks must be made from original reproduction artwork as provided by the IFPHK.

Correct Use:



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- 5.3 Under no circumstances may the logo marks be altered, modified or hand drawn, nor may they be typeset, reproduced or electronically scanned in such poor quality as to distort or significantly alter its appearance.

Correct Use:



- 5.4 The logo marks should be clearly associated with the individual certified by the IFPHK.

Correct Use:



Incorrect Mark:





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6. Rules for Reproducing the and CERTIFIED FINANCIAL PLANNER® Logo Marks

To control the quality of the appearance of the  and  CERTIFIED FINANCIAL PLANNER® marks, the IFPHK requires all reproductions to be made from original artwork, be readable, legible and on approved backgrounds, and have consistent use of color. The information below will provide your print vendor the information necessary to create proper reproductions of the marks.

6.1 Original Artwork

All reproductions of the logo marks must be made from original artwork provided by the IFPHK. To obtain positive and reverse reproduction images from the IFPHK, contact us at info@ifphk.org.

6.2 Readability

To maintain readability of the mark symbol, the following four graphic relationships between the mark and the mark symbol have been developed.







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6.3 Legibility

The impact and legibility of the printed  and  CERTIFIED FINANCIAL PLANNER® marks 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. As shown below, this space is determined by the cap height of “CFP”, the typographic element of the  and  CERTIFIED FINANCIAL PLANNER® marks.

Clear Zone



To ensure optimum legibility of the  and  CERTIFIED FINANCIAL PLANNER® marks, a minimum reproduction size of 6mm 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  and  CERTIFIED FINANCIAL PLANNER® marks cannot be guaranteed when reproduced at 6mm, a larger size may be necessary.

6.4 Approved Backgrounds

The positive mark should be used on light colored backgrounds ranging from white to values no darker than 40% of black. The  and  CERTIFIED FINANCIAL PLANNER® marks should be reversed if used on dark backgrounds from 50%–100% value of black.

6.5 Color Options

Consistent use of color in the mark is important to establish immediate recognition of individuals certified by an FPSB Member. The required two-color option for the mark uses PANTONE® 280 Blue for the flame element and black for the “CFP” and territory-specific trademark symbol.



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7. Using the CFP® Marks on Promotional Materials

The CFP®, CERTIFIED FINANCIAL PLANNER®, , CFP® and  CERTIFIED FINANCIAL PLANNER® 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 authorized by FPSB 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 IFPHK in Hong Kong and Macau; promotional materials may not contain the CFP marks alone. The IFPHK's publications that pertain the CFP certification in general are one of the exceptions to this rule.
- 7.3 Note the date of the promotion.
- 7.4 Do not produce promotional items for re-sale.
- 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® and  CERTIFIED FINANCIAL PLANNER® marks.



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8. Using the CFP® 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 mark symbol.

Correct Use:

Greta Lange recently attained the CERTIFIED FINANCIAL PLANNER® certification. She works with another CFP® professional in Toronto. They consider the CFP certification to be financial planning's gold standard.

- 8.3 Include the correct Hong Kong and Macau-specific legal notice (see section 10.0).
- 8.4 Identify FPSB 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® Marks in Electronic Media

Websites

- 9.1 Use the CFP marks as described in this guide.
- 9.2 In the content of each individual website page, only the **first use** of each mark needs the ® superscript symbol.
- 9.3 The CFP® and CERTIFIED FINANCIAL PLANNER® 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 IFPHK.

Correct Use:

- <META name “keywords” content = “CFP”>
- <META name “keywords” content = “CERTIFIED FINANCIAL PLANNER, CFP”>

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 marks and CERTIFIED FINANCIAL PLANNER marks may be used as website hyperlinks only if they link directly to FPSB’s website, www.fpsb.org.

Domain Names

- 9.5 The CFP marks and CERTIFIED FINANCIAL PLANNER marks may not be used as part of a domain name. They may appear as text or images throughout the website, according to the IFPHK’s rules for proper use.

Correct Use:

- www.simonlimfinancialplanning.com

Incorrect Use:

- www.simonlimcfp.com



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E-mail Addresses

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

Correct Use:

- pchan@hotmail.com
- abcfinaancialplanners@mchsi.com

Incorrect Use:

- slim@CFP4U.com
- slimcfp@limfinancial.com

Other Social/ Electronic Media

9.7 The CFP marks may not be used as part of a name or address in other social or electronic media, such as Twitter, LinkedIn, and Facebook.



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10. Hong Kong and Macau - Specific Trademark Symbols and Legal Notice

To claim ownership in Hong Kong and Macau, FPSB and the IFPHK require use of appropriate trademark symbols and legal notices. The proper legal notice for the CFP marks in Hong Kong and Macau is:

The CFP®, CERTIFIED FINANCIAL PLANNER®, ,  CERTIFIED FINANCIAL PLANNER®, AFP®, ASSOCIATE FINANCIAL PLANNER®, , AFP and  ASSOCIATE FINANCIAL PLANNER® are trademarks owned outside the United States by Financial Planning Standards Board Ltd. The Institute of Financial Planners of Hong Kong is the marks licensing authority for the CFP Marks and AFP Marks in Hong Kong and Macau, through agreement with FPSB.



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11. Frequently Asked Questions

Q1. How do I know if I have fully complied with the requirements?

A1. You may contact the IFPHK with any questions, comments or concerns at 2982 7888 or info@ifphk.org.

Q2. What are the “marks”?

A2. “marks” refer to the four CFP marks owned by FPSB: CFP®, CERTIFIED FINANCIAL PLANNER®,  and  CERTIFIED FINANCIAL PLANNER®.

Q3. Why can't I call myself a “CFP”?

A3. The CFP marks do not indicate a title, but a certification that is given in recognition of one's satisfaction of FPSB's initial and ongoing certification standards. Therefore, you must use “CFP” as an adjective (as required by trademark law). The only exception is when the “CFP” mark is used following an individual's name, e.g. Simon Lim, CFP®.

Q4. Why do FPSB and the IFPHK insist on correct use of the CFP marks?

A4. Marks enforcement is consistent with FPSB's and the IFPHK's mission to protect the public. It is important that the CFP marks do not fall into common use and become generic. If the marks no longer stand for the competency, ethics and professional practice standards established by FPSB and the IFPHK, then we will be unable to protect the public as we do today. If the CFP marks are unprotected, the public will not be able to differentiate between a personal financial planner who has completed the rigorous CFP certification requirements and one who has not.

Q5. Can I take my CFP certification with me when I relocate to another Affiliate territory?

A5. Because each territory has its own specific legal, tax, regulatory and other systems and requirements, CFP certification is adapted to indicate financial planner competency for that territory. If you wish to hold yourself out as a CFP certificant capable of practicing financial planning in a new territory, you must meet the Affiliate's certification requirements for cross border certification.

For certification requirements of each affiliate, you may refer to:

<http://www.ifphk.org/about-IFPHK/fpsb-affiliates>.

For FPSB's Cross-border Marks Use Policy, you may refer to

http://www.ifphk.org/pdf/CFP/CFP_Certification_Information/CrossBorderPolicy.pdf



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Q6. Do I have to use all four CFP marks (CFP®, CERTIFIED FINANCIAL PLANNER®, CFP® and CERTIFIED FINANCIAL PLANNER®) in my business materials?

A6. No. You may use one, two or all three of the marks as long as you follow the appropriate rules for each mark.

Q7. Shall I report to the IFPHK of any misuse of CFP marks?

A7. The IFPHK understands that third party mark misuse is not within your control. As a CFP certificant, you have agreed to comply with the rules in this guide and we ask that you report back to the IFPHK if you encounter such cases.

Q8. What happen if I do not follow the rules in this guide?

A8. As a CFP certificant, you have agreed to adhere to the rules and regulations set by the IFPHK. Following this guide is a condition of being permitted to display the marks. If for some reasons you decide not to follow the rules in this guide, you may be subject to the IFPHK's disciplinary process.

Q9. I want to promote proper use of the CFP marks but am not sure if I am using them correctly. Before I have advertising or business materials printed/published, can my materials be reviewed?

A9. The IFPHK encourages all CFP professionals to submit their use of the CFP marks in collateral materials for review prior to publishing. Remember to allow sufficient time before your scheduled print/publish date for the IFPHK to conduct an appropriate review.



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