



Guide to Use of the AFP® Marks

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

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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®, ,  CERTIFIED FINANCIAL PLANNER®, AFP®, ASSOCIATE FINANCIAL PLANNER®,  AFP and  ASSOCIATE FINANCIAL PLANNER® certification and service 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 and AFP certification program in Hong Kong and Macau.

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

AFP®
ASSOCIATE FINANCIAL PLANNER®
 AFP
 ASSOCIATE FINANCIAL PLANNER®

A person’s use of the above AFP 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 AFP marks are protected and used properly in Hong Kong and Macau, and that any person using the AFP marks has met appropriate certification requirements. Unlike licenses to practice or educational credentials, AFP certification and their service marks must be used in compliance with trademark law in Hong Kong and Macau.

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

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



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1. Rules for Use of the AFP® Marks

- 1.1 The marks AFP®, ASSOCIATE FINANCIAL PLANNER®,  and  ASSOCIATE FINANCIAL PLANNER® should be used only as described in this guide.
- 1.2 AFP certificants and other IFPHK stakeholders acknowledge that FPSB is the sole, absolute and exclusive owner of all rights, title and interest in, and to, the AFP marks outside the United States.
- 1.3 AFP certificants 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 AFP marks outside the United States.
- 1.4 AFP certificants and other IFPHK stakeholders will not challenge the validity of the AFP marks.
- 1.5 AFP certificants and other IFPHK stakeholders will not adopt, use or promote any mark that is confusingly similar to any of the AFP marks, as determined by FPSB.
- 1.6 AFP certificants and other IFPHK stakeholders will not take, encourage or promote any action that would/does impair the rights of FPSB in and to the AFP marks or the goodwill associated with them, or use the AFP marks in a way that would make it difficult for FPSB to assert its ownership of the AFP marks outside the United States.
- 1.7 AFP certificants are subject to the conditions relating to use of the AFP marks as set forth in IFPHK's AFP Certification Renewal Application Form, if not included in this guide.
- 1.8 The AFP 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 AFP marks).
- 1.9 The AFP marks may not be used as part of the name of an individual's business or company.
- 1.10 The form of the AFP 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 9) or the following notice in materials that use the AFP marks: “Financial Planning Standards Board Ltd. (FPSB) owns the AFP®, ASSOCIATE FINANCIAL PLANNER®,  AFP® and  ASSOCIATE 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 AFP® Marks

AFP certificants should follow the FPSB and the IFPHK's requirements when using the AFP®, ASSOCIATE FINANCIAL PLANNER®,  AFP and  ASSOCIATE FINANCIAL PLANNER marks in communications and collateral materials. You will greatly assist FPSB and the IFPHK in protecting the AFP marks if you follow these general rules that apply to all marks.

2.1 Always Use the AFP® Marks as Adjectives

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

Correct Use:

- I am an AFP® professional.
- My ASSOCIATE FINANCIAL PLANNER® practitioner is named Simon Lim.

Incorrect Use:

- I am an AFP®
- My planner is an ASSOCIATE FINANCIAL PLANNER®

2.2 Only Modify Certain Nouns with the AFP® Marks

Since the AFP marks identify individuals who have met the AFP 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 AFP marks – “certificant”, “certification”, “mark”, “practitioner” and “professional”.

Correct Use:

- AFP® professional
- AFP® practitioner
- ASSOCIATE FINANCIAL PLANNER® mark

Incorrect Use:

- AFP® firm
- AFP® advertisement
- ASSOCIATE FINANCIAL PLANNER® qualification



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3. Requirements for Using the AFP® Mark

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

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

Correct Use:

- Simon Lim, AFP®

Incorrect Use:

- Simon Lim, afp®
- Greta Lange, A.F.P.®

3.2 The AFP® 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 an AFP® professional.

Incorrect Use (as first use in printed materials):

- Simon Lim is an AFP professional specializing in estate planning.

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

Correct Use:

- Greta Lange is an AFP® practitioner or ASSOCIATE FINANCIAL PLANNER® practitioner

Incorrect Use:

- Simon Lim is an ASSOCIATE FINANCIAL PLANNER® (AFP®) professional.



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3.4 The AFP® 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 AFP mark is used following an individual's name, e.g., Simon Lim, AFP®.

Correct Use:

- Simon Lim is an AFP® certificant.
- Mary Murphy practices financial planning as an AFP® certificant.

Correct Use: (Following Practitioner's Name)

- Peter Chan, AFP®
- Greta Lange, AFP®
Lange Financial Services

Incorrect Use:

- Simon Lim is an AFP®.
- He practices financial planning as an AFP®.

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

Correct Use:

- Greta Lange and Simon Lim are AFP® certificants.
- The AFP® certificants' seminar was sold out.

Incorrect Use:

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

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

Correct Use:

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

Incorrect Use:

- Simon Lim is an AFP®.
- Greta Lange has obtained her AFP® degree.



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4. Requirement for Using the ASSOCIATE 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 ASSOCIATE FINANCIAL PLANNER® mark must appear in all capital letters.

Correct Use:

- Simon Lim is an ASSOCIATE FINANCIAL PLANNER® professional.

Incorrect Use:

- Simon Lim is an Associate Financial Planner® professional.

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

Correct Use:

- Her clients like working with an ASSOCIATE FINANCIAL PLANNER® practitioner.

Incorrect Use:

- Her clients like working with an ASSOCIATE FINANCIAL PLANNER practitioner.

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

Correct Use:

- Greta Lange is an AFP® practitioner or ASSOCIATE FINANCIAL PLANNER® practitioner.

Incorrect Use:

- Simon Lim is an AFP® (ASSOCIATE FINANCIAL PLANNER®) practitioner.



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4.4 The ASSOCIATE 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 AFP mark is used following an individual's name.

Correct Use:

- Simon Lim is an ASSOCIATE FINANCIAL PLANNER® professional.

Correct Use (Following Practitioner's Name):

- Simon Lim, ASSOCIATE FINANCIAL PLANNER®
Lim Financial Services

Incorrect Use:

- Mary Murphy provides associate financial planning.

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

Correct Use:

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

Incorrect Use:

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

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

Correct Use:

- Simon Lim is an ASSOCIATE FINANCIAL PLANNER® professional.
- He has obtained the ASSOCIATE FINANCIAL PLANNER® certification.

Incorrect Use:

- Simon Lim is an ASSOCIATE FINANCIAL PLANNER® advisor.
- He completed the ASSOCIATE FINANCIAL PLANNER® course.



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5. Requirements for Using the AFP and ASSOCIATE FINANCIAL PLANNER® Marks

- Always use the three components of the logo – flame, “AFP” or “ASSOCIATE FINANCIAL PLANNER” and the superscript symbols (“®”).
- 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 “AFP” or the words “ASSOCIATE FINANCIAL PLANNER” and the “®” symbol. These three components must be used together as one unit at all times to protect the visual integrity of the mark.

Correct Use:



Incorrect Use:

- Any deviation from the three components above is a misuse and is an unacceptable use.

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

Correct Use:



Incorrect Use:

- Do not use without the appropriate trademark symbol.
- Do not use without the flame.
- Do not use the flame alone.
- Do not separate the graphic elements.
- Do not add other elements.
- Do not re-proportion the elements.
- Do not reproduce the mark in unapproved colors.
- Do not reproduce the mark on complex backgrounds.

5.3 Under no circumstances may the logo marks be altered, modified or hand drawn, nor



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may they be typeset, reproduced or electronically scanned in such poor quality as to distort or significantly alter its appearance.

Correct Use:



 **ASSOCIATE FINANCIAL PLANNER®**

Incorrect Use:

- Do not use poor quality reproduction art.
- Do not try to recreate the mark.
- Do not skew or distort the mark.
- Do not use the mark in outline form.

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

Correct Use:

 **AFP®** Simon Lim, AFP®

 **ASSOCIATE FINANCIAL PLANNER®** Simon Lim, AFP®

Incorrect Use:

 **AFP®** Lim Financial Services Corp.

 **ASSOCIATE FINANCIAL PLANNER®** Lim Financial Services Corp.



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6. Rules for Reproducing the **AFP** and **ASSOCIATE FINANCIAL PLANNER** Marks

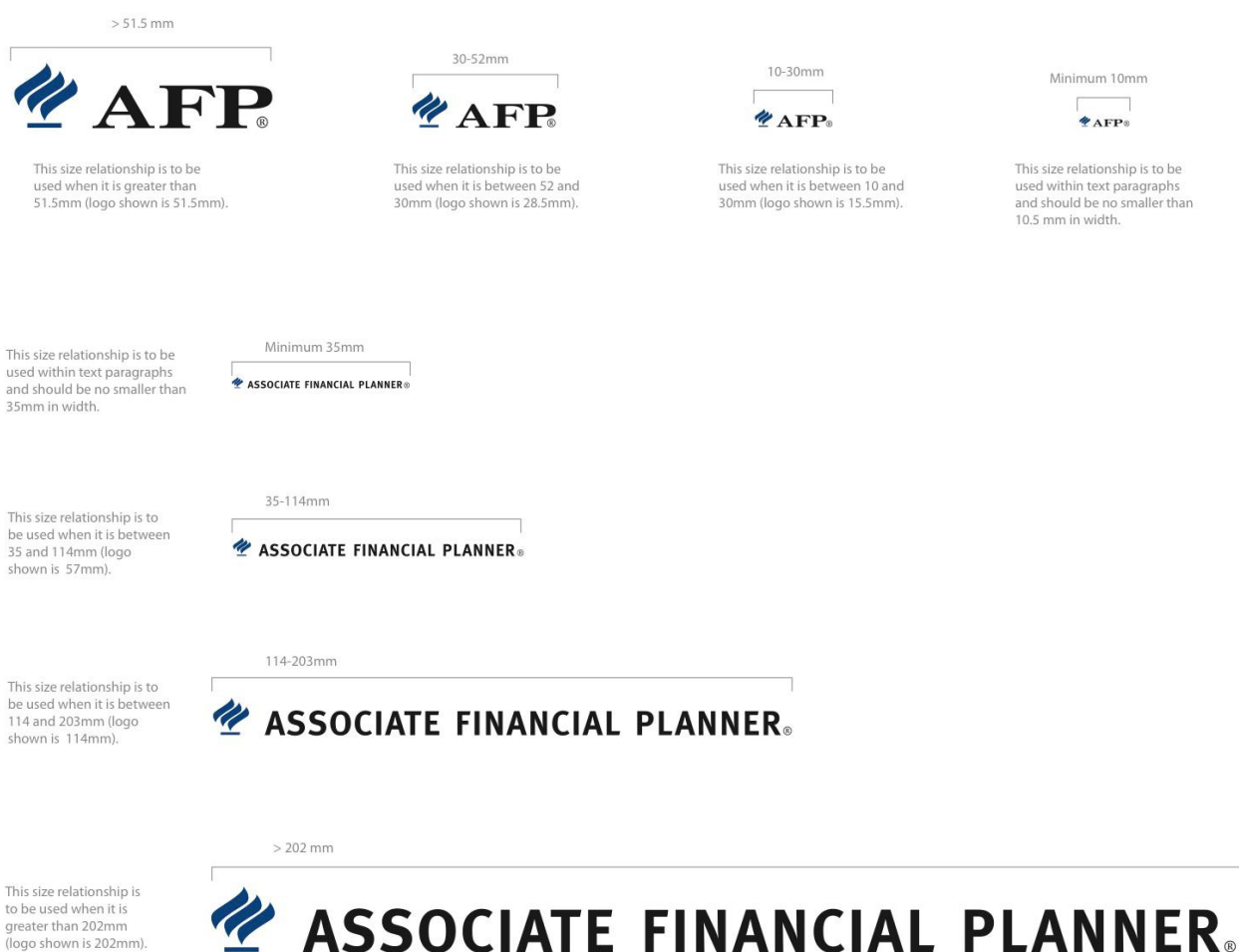
To control the quality of the appearance of the  **AFP** and  **ASSOCIATE FINANCIAL PLANNER** marks, the IFPHK requires all reproductions to be made from original artwork, be readable, legible and on approved backgrounds, and have consistent use of color. The information below will provide your print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

6.1 Original Artwork

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

6.2 Readability

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



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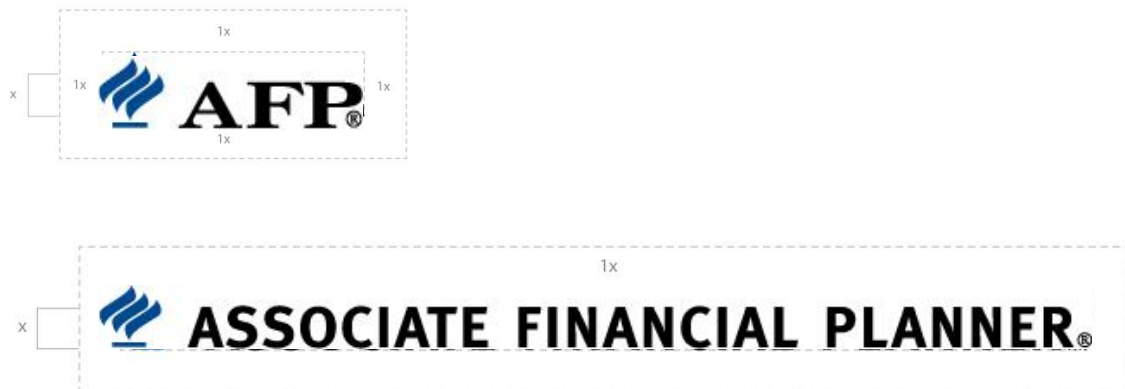
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6.3 Legibility

The impact and legibility of the printed  **AFP**® and  **ASSOCIATE 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 'AFP,' the typographic element of the  **AFP** logo mark, as represented by 'x' in the graphics below. The one exception to this rule is when the mark is used within text.

A similar clear zone for the  **ASSOCIATE FINANCIAL PLANNER**® mark must be maintained.



To ensure optimum legibility of the  **ASSOCIATE FINANCIAL PLANNER**® logo mark, a minimum reproduction size of 36mm and 10.5mm respectively is recommended. If reduced to a smaller size, the overall legibility and visual impact of the mark may be compromised.

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 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 the IFPHK. The required two-color option for the mark uses PANTONE® 280 Blue for the flame element and black for the "AFP" and ® trademark symbol.



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7. Using the AFP® Marks on Promotional Materials

The marks AFP®, ASSOCIATE FINANCIAL PLANNER®,  **AFP** and  **ASSOCIATE FINANCIAL PLANNER** may be used on promotional materials provided the following requirements are met:

- 7.1 Use the AFP marks as described in this guide. Merchandise authorized by the IFPHK is the only case where some exceptions to these rules may apply.
- 7.2 Link the AFP marks clearly to an individual or group of individuals certified by the IFPHK in Hong Kong and Macau; promotional materials may not contain the AFP marks alone. The IFPHK's publications that pertain the AFP 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 AFP 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  **AFP** and  **ASSOCIATE FINANCIAL PLANNER** marks.

Letterhead and Business Cards (not shown actual size)

- A. Stationery shows all marks (AFP®, ASSOCIATE FINANCIAL PLANNER®,  **AFP** and  **ASSOCIATE FINANCIAL PLANNER**.) after personalization and in close proximity to personalization.

John A. Doe, AFP®
ASSOCIATE FINANCIAL PLANNER® Professional
 **AFP**
 **ASSOCIATE FINANCIAL PLANNER**.

- B. Stationery shows marks (AFP® and ASSOCIATE FINANCIAL PLANNER®) after personalization.

John A. Doe, AFP®
ASSOCIATE FINANCIAL PLANNER® Professional
President



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Resume (not shown actual size)

Show all marks (AFP®, ASSOCIATE FINANCIAL PLANNER®,  and  ASSOCIATE FINANCIAL PLANNER®) after personalization and in close proximity to personalization.

 JOHN A. DOE, AFP®
ASSOCIATE FINANCIAL PLANNER® Professional
1234 North Street
Anytown, IL61000



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8. Using the AFP® Marks in Electronic Media

Websites

8.1 Use the AFP marks as described in this guide.

8.2 In the content of each individual web site page, only the **first use** of each mark needs the ® superscript symbol.

8.3 The AFP marks and ASSOCIATE 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 = “AFP”>
- <META name “keywords” content = “ASSOCIATE FINANCIAL PLANNER, AFP”>

Incorrect Use:

- <META name “keywords” content = “AFP, AFP, AFP, AFP”>
- <META name “keywords” content = “ASSOCIATE FINANCIAL PLANNER, ASSOCIATE FINANCIAL PLANNER, ASSOCIATE FINANCIAL PLANNER”>

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

Domain Names

8.5 The AFP marks and ASSOCIATE FINANCIAL PLANNER marks may not be used as part of a domain name. They may appear as text or images throughout the web site, according to the IFPHK’s rules for proper use.

Correct Use:

- www.peterchanfinancialplanning.com
- www.abcplanner.com

Incorrect Use:

- www.peterchanAFP.com
- www.abccertifiedfinancialplanner.com/AFP
- www.AskAFP.com



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E-mail Addresses

8.6 The AFP marks and ASSOCIATE FINANCIAL PLANNER marks may not be used as part of an e-mail address.

Correct Use:

- pchan@hotmail.com
- abcfinancialplanners@mchsi.com

Incorrect Use:

- AFPpeterchan@aol.com
- pchanAFP@msn.com
- pchan@AFP4U.com



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9. 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 AFP 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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10. 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 AFP marks owned by FPSB: AFP®, ASSOCIATE FINANCIAL PLANNER®,  AFP and  ASSOCIATE FINANCIAL PLANNER®.

Q3. Why can't I call myself an “AFP”?

A3. The AFP 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 “AFP” as an adjective (as required by trademark law). The only exception is when the “AFP” mark is used following an individual's name, e.g. Simon Lim, AFP®.

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

A4. Marks enforcement is consistent with FPSB's and the IFPHK's mission to protect the public. It is important that the AFP 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 AFP marks are unprotected, the public will not be able to differentiate between a personal financial planner who has completed the rigorous AFP certification requirements and one who has not.

Q5. Can I take my AFP 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, AFP certification is adapted to indicate financial planner competency for that territory. If you wish to hold yourself out as an AFP 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/en_about_affiliations_list.aspx.

Q6. Do I have to use all four AFP marks (AFP®, ASSOCIATE FINANCIAL PLANNER®, AFP and ASSOCIATE 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 AFP marks?

A7. The IFPHK understands that third party mark misuse is not within your control. As an AFP 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.



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

A8. As an AFP 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 AFP 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 AFP professionals to submit their use of the AFP 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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