



FPSB India's Guide to Use of the CFP Marks by the Media

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Introduction

Financial Planning Standards Board Ltd. (“FPSB”) owns the CFP, CERTIFIED FINANCIAL PLANNER and  certification and service marks (“CFP Marks”), and oversees the development of international CFP certification standards to benefit and protect consumers outside the United States. By meeting and maintaining FPSB’s licensing and affiliation requirements and standards, Financial Planning Standards Board India (FPSB India) is authorized to administer the CFP certification program in India. Individuals who have met FPSB India’s initial certification and renewal standards are authorized to use the following three marks in India:



CFP^{CM}

CERTIFIED FINANCIAL PLANNER^{CM}

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

To benefit and protect the public, FPSB India must ensure that the CFP Marks are protected and used properly in India, 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 India.

If certification marks 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, FPSB India requires all stakeholders to follow these guidelines for the use of the CFP Marks. Proper use of the CFP Marks by education partners is mandated through the contract with FPSB India.

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

Guidelines

The media often uses the CFP and CERTIFIED FINANCIAL PLANNER marks in stories on finance and financial planning. Because they are certification marks, FPSB India requires that you use them accurately. Proper use helps protect the value of the CFP marks, and the integrity of the CFP certification program, for consumers.

There are a few simple guidelines you should follow when using the CFP marks in your copy.

1. For the CFP mark, always use all capital letters, never use periods, and do not use as a parenthetical for the CERTIFIED FINANCIAL PLANNER mark.

Incorrect Use:

- ✓ John , cfp
- ✓ Greta Lange, C.F.P.
- ✓ Simon Lim is a CERTIFIED FINANCIAL PLANNER (CFP) professional.

2. For the CERTIFIED FINANCIAL PLANNER mark, always use all capital letters or large and small capital letters, and do not use as a parenthetical for the CFP mark.

Incorrect Use:

- ✓ Simon Lim is a CFP.
- ✓ My planner is a CERTIFIED FINANCIAL PLANNER.
- ✓ Simon Lim is a CFP (CERTIFIED FINANCIAL PLANNER) professional.

3. Use the CFP marks as adjectives, not nouns. FPSB India has approved the following nouns for use with the CFP marks: certificant, certification, credential, designation, exam/examination, mark, practitioner and professional.

Incorrect Use:

- ✓ Simon Lim is a CFP.
- ✓ My planner is a CERTIFIED FINANCIAL PLANNER.