MARK USAGE GUIDELINES
Service Marks Usage Guidelines

The College for Financial Planning is the owner of the following service marks (marks) and their corresponding logos. U.S. trademark law sets forth specific rules on how trademarks must be used in order to protect their registered status with the U.S. Patent and Trademark Office. Having worked hard to obtain the privilege to use these marks, you will want to protect them and use them wisely. This guide provides you with some basic usage guidelines. If you have usage questions that are not covered by this guide, please do not hesitate to contact us at 800-237-9990.

Service Marks

“A service mark is a word, phrase, symbol or design, or a combination of words, phrases, symbols or designs, that identifies and distinguishes the source of the service of one party from those of others.” (From Facts About Trademarks, U.S. Department of Commerce, Patent and Trademark Office.)

The College’s service marks may only be used by the College and by those individuals specifically authorized by the College. Use of the College's service marks denote professionals who have successfully completed the requirements of the designation program and are currently complying with the designation Standards of Professional Conduct and ongoing renewal requirements. The marks should be used consistently and correctly to preserve their integrity and distinctiveness. As the owner of these marks, the College has the legal responsibility to ensure that they are protected and used only by those who have received written authorization from the College for Financial Planning to use them. The College reserves the authority both to grant and revoke the privilege of using these marks.

These marks may NOT be used in any of the following ways:

- As part of the name of a firm or firm logo. This also applies where one or more firm members are authorized to use the marks in association with their own names.
- As the name of an investment product or plan.
- As generic terms. This occurs when a mark is used to describe a product or service. Examples of generic uses are:
  “Xeroxes” instead of “Xerox® copies”
  “Kleenexes” instead of “Kleenex® tissues”
  “Band-Aids” instead of “Band-Aids® brand bandages.”

Attribution Statement

Specify that the marks belong to the College for Financial Planning with an attribution statement or footnote at the end of an article, or at the bottom of the page of an advertisement on which the mark appears, or the inside cover of a brochure. Use this wording (substitute the correct mark): ACCREDITED ASSET MANAGEMENT SPECIALIST℠ and AAMS® are trademarks or registered service marks of the College for Financial Planning in the United States and/or other countries.
Using the Word Marks

Accredited Asset Management Specialist℠
Accredited Domestic Partnership Advisor℠
Accredited Portfolio Management Advisor℠
Accredited Wealth Management Advisor℠
Chartered Mutual Fund Counselor℠
Chartered Retirement Planning Counselor℠
Chartered Retirement Plans Specialist℠
Master Planner Advanced Studies℠
Financial Paraplanner Qualified Professional™

- Capitalize the first letter of each word, use all caps, or small cap font.
- Use as adjectives, not nouns. For example, follow the words with a noun such as designee, designation, or professional.
- Do not incorporate the marks into the title of a company and product.
- Use the SM symbol with all credentials except the FPQP™ which uses the TM symbol.

Correct

- She earned the Accredited Asset Management Specialist℠ designation.
- Our firm employs several Financial Paraplanner Qualified Professional™ professionals.

Incorrect

- Being a chartered mutual fund counselor is very rewarding.
- Jane Doe, AWMA® and Sally Smith, AWMA® - Accredited Wealth Management Advisors, Inc.

Using the Letter Marks

AAMS®, ADPA®, APMA®, AWMA®, CRPC®, CRPS®, CMFC®, MPAS®, FPQP™

- Use all capital letters.
- Do not use periods.
- Use as adjectives, not nouns. For example, follow the letters with a noun such as designee, designation, or professional.
- Do not use the letter marks in parentheses. For example, Chartered Mutual Fund Counselor℠(CMFC®) should instead be written as: Chartered Mutual Fund Counselor℠, CMFC®
- Always use the ® symbol when referring to the credential as an acronym.

Correct

- She is a CRPC® designee.
- I am studying for the APMA® designation.
- Jane Doe, AWMA®
- I am an MPAS® professional.

Incorrect

- He has his AWMA®
- John Doe, C.R.P.S

Using the Logos

- Do not alter the design or color.
- Obtain an electronic image file from the College. Do not try to recreate the logo.
- Use in close proximity to your name.
- Do not use as part of your business name or logo.
About the College of Financial Planning

The College for Financial Planning is a regionally-accredited institution of higher education accredited by the Higher Learning Commission, a member of the North Central Association. The College offers Master of Science Degrees in Personal Financial Planning and Finance, nine proprietary professional designations, and the CFP Certification Professional Education Program. Founded in 1972, the College is the country’s most established provider of financial planning education and has over 150,000 graduates from its Master’s and non-degree programs.

AAMS®, Accredited Asset Management SpecialistSM; ADPA®, Accredited Domestic Partnership AdvisorSM; APMA®, Accredited Portfolio Management AdvisorSM; AWMA®, Accredited Wealth Management AdvisorSM; CMFC®, Chartered Mutual Fund CounselorSM; CRPC®, Chartered Retirement Planning CounselorSM; CRPS®, Chartered Retirement Plans SpecialistSM; MPAS®, Master Planner Advanced StudiesSM; FPQP™, Financial Paraplanner Qualified Professional™ are trademarks or registered service marks of the College for Financial Planning and are awarded to individuals who successfully complete the College’s initial and ongoing designation requirements.

A list of individuals currently authorized to use one of the College’s professional designations can be found on our website: www.CFFPinfo.com