




FINANCIAL PLANNING STANDARDS BOARD

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

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 consumers outside the United States. By meeting and maintaining FPSB Ltd.'s licensing and affiliation requirements and standards, FPSB Affiliates are authorized to administer the CFP® certification program in their territories. Individuals who have met FPSB Ltd.'s initial certification and renewal standards are authorized to use the following three marks:



CERTIFIED FINANCIAL PLANNER®

A person's use of the CFP® Marks identifies that he or she has met rigorous ethics, competency and professional practice standards to deliver financial planning as established by FPSB Ltd. and locally adapted and administered by the FPSB Affiliate in that territory.

To benefit the public, FPSB Ltd. ensures that the CFP® Marks are protected and used properly in each territory, and that any person using the CFP® Marks has met appropriate certification requirements. The CFP® certification and service marks must be used in compliance with trademark law in each territory in which they are registered

If trademarks or certification marks are used improperly, they could eventually lose their protected 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 Ltd. asks the media 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 FPSB Indonesia to review materials that you are developing which feature the CFP® Marks; please contact us at info@fpsbindonesia.com.

Guidelines

The media often uses the CFP[®] and CERTIFIED FINANCIAL PLANNER marks in stories on finance and financial planning. Because they are trademarks, FPSB and its Affiliates ask that you use them accurately as required by local trademark law. 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:

Simon Lim, 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 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[®].