COLLEGE FOR FINANCIAL PLANNING®
A KAPLAN COMPANY

Professional Designations Toolkit

Resources for our professional designation holders

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The College for Financial Planning®—a Kaplan Company has developed this **Professional Designations Toolkit** to support our professional designation holders in creating communications and awareness about the credential(s) you have earned and what that means to the clients you serve. This toolkit contains ideas for how to communicate your recent educational accomplishments and other resources.

Note: We encourage you to check with your company for additional guidelines about how its employees may market their credentials before pursuing ideas in this toolkit.

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Guidelines for Using Your Professional Designation Marks

The College's certification marks may only be used by those individuals specifically authorized by the College. Use of the College's certification marks denotes professionals who have successfully completed the requirements of the program and are currently complying with the Standards of Professional Conduct and ongoing renewal requirements.

As the owner of these marks, the College for Financial Planning has the legal responsibility to ensure that they are protected and used only by those who have received written authorization from the College to use them.

Please refer to the College's Professional Designation Marks Usage Guidelines for instructions on how you may use the certification marks you have earned.

How to Claim Your Digital Badge

Digital badges are an optional way for you to easily share your professional accomplishments with others while providing verification of their authenticity. The College has partnered with Credly, an independent third-party badging organization, to issue and authenticate digital badges for our credentials.

After you successfully pass the final exam of your professional designation program, you will be prompted to complete a designation application online (encompassing standards of professional conduct, a declaration, and terms and conditions), which is the final requirement before you may use your designation mark(s).

After the College reviews your designation application submission, you will receive an email related to the conferment of your designation with:

- A link to our Professional Designation Marks Usage Guidelines and
- Instructions for how to claim your digital badge

How to Announce Your Professional Designation on Social Media

Announcing your certifications on social media channels, such as LinkedIn®, is one way you can illustrate the investment you have put into your career and present your expertise as a professional in your field.

In addition to adding your professional designation to your profile (for instructions, visit the LinkedIn® Help section), you can announce your accomplishment through a post. **Note: Before you promote your designation(s) on social media, you should read and follow the platforms' respective terms to ensure your post is in compliance.**
As part of the post, consider including:

- The reason why you took the professional designation program
- Highlights of the skills or knowledge you gained
- The difference in your professionalism and expertise level after completing the program
- Tagging your instructors and the College for Financial Planning

Don't forget to follow the College on LinkedIn® and like us on Facebook.

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How to Announce Your Professional Designation to Your Clients

In addition to announcing your certifications on your social media channels, you can also announce your accomplishments to your current clients. If so, here is a template you can use to highlight why clients should work with a financial professional who has earned a certain designation.

How Your Company Can Announce Your Professional Designation

Ask your company if it announces the certifications or designations its employees earn. Companies often may do this through email or a post on the company's intranet site or website. If so, here is a template that your company can use to announce your recent accomplishment(s).

How to Partner with the College on an Opinion-Editorial Article

An opinion-editorial is a short article expressing a viewpoint on a timely news topic that is featured in publications and websites. An opinion-editorial is another way to publicize a recently earned professional designation and reach prospective clients by addressing an issue that you have expertise on through the knowledge you've gained in your financial planning career. The College for Financial Planning® has helped publish opinion-editorials for its designees in platforms such as VettaFi Advisor Perspectives.

If you are interested in participating in an opinion-editorial opportunity, contact the College to learn more. Email cffpssc@cffp.edu or call 800-237-9990, option 2.

How to Partner with the College on a Testimonial

A testimonial (either in written or video format) is another way to publicize a recently earned professional designation and reach prospective clients by discussing what the knowledge you've gained means for your financial planning career. The College for Financial Planning® has featured written and video testimonials by its designees on our website and through our social profiles.

If you are interested in pursuing a testimonial opportunity, you can contact the College for Financial Planning® to learn more. Email cffpssc@cffp.edu or call 800-237-9990, option 2.

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