



COLLEGE FOR
FINANCIAL PLANNING®
A KAPLAN COMPANY

Professional Designations Marks Usage Guidelines

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Professional Designations Marks Usage Guidelines

The College for Financial Planning®—a Kaplan Company is the owner of the following certification 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.

Certification 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 denote professionals who have successfully completed the requirements of the program and are currently complying with the 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."

The College's Marks

AAMS®

Accredited Asset Management Specialist™

ABFP®

Accredited Behavioral Finance Professional™

ADPA®

Accredited Domestic Partnership Advisor™

APMA®

Accredited Portfolio Management Advisor™

AWMA®

Accredited Wealth Management Advisor™

CMFC™

Chartered Mutual Fund Counselor™

CRPC™

Chartered Retirement Planning Counselor™

CRPS™

Chartered Retirement Plans Specialist™

CSRIC®

Chartered SRI Counselor™

FPQP®

Financial Paraplanner Qualified Professional™

MPAS™

Master Planner Advanced Studies™

PGWTA™

Professional Generational Wealth Transfer Advisor™

QPFE™

Qualified Personal Finance Educator™

SE-AWMA®

Sports & Entertainment Accredited Wealth Management Advisor™

WMS™

Wealth Management Specialist™



Using the Word Marks

Accredited Asset Management Specialist™
Accredited Behavioral Finance Professional™
Accredited Domestic Partnership Advisor™
Accredited Portfolio Management Advisor™
Accredited Wealth Management Advisor™
Chartered Mutual Fund Counselor™
Chartered Retirement Planning Counselor™
Chartered Retirement Plans Specialist™
Chartered SRI Counselor™
Financial Paraplanner Qualified Professional™
Master Planner Advanced Studies™
Professional Generational Wealth Transfer Advisor™
Qualified Personal Finance Educator™
Sports & Entertainment Accredited Wealth
Management Advisor™
Wealth Management Specialist™

- Capitalize the first letter of each word, use all caps, or use 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 ™ symbol with all word marks.

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 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 it as part of your business name or logo.

Using the Letter Marks

AAMS®, ABFP®, ADPA®, APMA®, AWMA®, CMFC™, CRPC™, CRPS™, CSRIC®, FPQP®, MPAS™, PGWTA™, QPFETM, SE-AWMA®, WMS™

- Use all capital letters.
- Do not use periods.
- Use as adjectives, not nouns.
For example, follow the letter mark with a noun such as “designee,” “designation,” or “professional.”

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.



Attribution Statement

Professional designation holders must specify that certification 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 an advertisement on which the marks appears, or the inside of a brochure.

Use this wording (substitute with the correct certification mark): Accredited Asset Management Specialist™, AAMS®, and the AAMS® logo are certification marks or registered certification marks of The College for Financial Planning Institutes Corp. in the United States.

Cessation of Use Upon Non-Compliance

Authorized use of the College for Financial Planning's certification marks is conditional upon the designee's continued compliance with all applicable designation requirements, including adherence to ongoing education, renewal requirements, and standards of professional conduct. If a designee fails to meet any of these requirements, they must immediately cease all use of the certification marks across all platforms, including but not limited to resumes, business cards, social media, and digital platforms. Unauthorized or continued use of the marks following non-compliance is prohibited and may result in legal action to protect the integrity of the marks.

Reporting Misuse of Certification Marks

The College for Financial Planning encourages authorized users to help protect the integrity of our certification marks by reporting any observed misuse. Misuse includes unauthorized individuals using the marks, incorrect or misleading presentation of the marks, or usage that conflicts with these guidelines. If you believe that the marks are being misused, please email Alumni Operations at renewals@cffp.edu with details of the misuse. The College will review all reports promptly and take appropriate action to protect the integrity of the certification marks.

Non-Disparagement Clause

The College for Financial Planning's certification marks represent a commitment to high professional standards. Authorized users must use these marks in a manner that upholds this reputation and should avoid any use that could harm the marks' image or diminish their professional value. Users are expressly prohibited from using the marks in any context that may be considered derogatory, defamatory, or damaging to the reputation or goodwill of the College or the marks themselves. Any disparaging use, including but not limited to association with unprofessional conduct or promotion of misleading information, is grounds for immediate revocation of the privilege to use the marks.

About the College for Financial Planning®—a Kaplan Company

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 a Master of Science Degree in Personal Financial Planning, a Master of Science Degree in Financial Analysis, 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 nearly 200,000 graduates from its master's and non-degree programs. Accredited Asset Management Specialist™; AAMS®; Accredited Behavioral Finance Professional™; ABFP®; Accredited Domestic Partnership Advisor™; ADPA®; Accredited Portfolio Management Advisor™; APMA®; Accredited Wealth Management Advisor™; AWMA®; Chartered Mutual Fund Counselor™; CMFC™; Chartered Retirement Planning Counselor™; CRPC™; Chartered Retirement Plans Specialist™; CRPS™; Chartered SRI Counselor™; CSRIC®; Financial Paraplanner Qualified Professional™; FPQP®; Master Planner Advanced Studies™; MPAS™; Professional Generational Wealth Transfer Advisor™; PGWTA™; Qualified Personal Finance Educator™; QPFE™; SE-AWMA®; Sports & Entertainment Accredited Wealth Management Advisor™; Wealth Management Specialist™; and WMS™ are trademarks or registered service marks of the College for Financial Planning®—a Kaplan Company, 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.kaplanfinancial.com/wealth-management/resources/find-a-financial-advisor.

Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP® (with plaque design) in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

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