



COLLEGE FOR
FINANCIAL PLANNING®
A **KAPLAN** COMPANY



Professional Designations Marks Usage Guidelines



COLLEGE FOR FINANCIAL PLANNING®

A **KAPLAN** COMPANY

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™

SE-AWMA™

Sports & Entertainment Accredited Wealth Management Advisor™

WMS™

Wealth Management Specialist™

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."





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Using the Letter Marks

AAMST™, ABFP™, ADPAT™, APMA™,
AWMA™, CMFC™, CRPC™, CRPST™, CSRIC®,
FPQP®, MPAS™, 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.”
- 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 except CSRIC® and FPQP®.

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 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™
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.





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

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 over 195,000 graduates from its master's and non-degree programs. Accredited Asset Management Specialist™; AAMST™; 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™; Sports & Entertainment Accredited Wealth Management Advisor™; SE-AWMA™; 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.



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