CFP BOARD CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.

1425 K ST NW #500 ■ WASHINGTON, DC 20005 ■ P 202-379-2200 ■ F 202-379-2299 ■ CFP.NET ■ KRUSSI@CFPBOARD.ORG

# Order Form for CFP Board Mailing Lists

Mailing lists contain information for CFP® professionals or current applicants for the CFP® exam who have not chosen to opt-out of third party communications. Lists include first and last names, street address, city, state and zip code. CFP Board does not sell e-mail addresses.

CFP Board reserves the right to deny any request.

## SECTION I: Contact Information

**Company Name:** _____

**Mailing Address:** _____

**Name of Contact:** _____

**Phone:** _____ **E-mail:** _____

## SECTION II: Company Type and Tax Status

**Company Type:**

- ☐ **CFP Board CE Sponsor** ID Number: _____
- ☐ **CFP Board-Registered Program**
- ☐ **CFP® Exam Review Course Provider**
- ☐ **Financial Planning-related Membership Association**
- ☐ **Other, specify**_____

**Tax Status:**

- ☐ **For Profit**
- ☐ **Non-Profit**

## SECTION III: List Options and Pricing

**List Options:** Lists are available in two formats: 1) A **Full List** of all current CFP® professionals or current applicants for the CFP® exam in the U.S. who have not opted out of third-party communications; or 2) A **Segmented List** of CFP® professionals or current applicants for the CFP® exam in selected zip codes, cities or states who have not opted out of third-party communications. Select your preferred list type below.

☐ **Full List** (National) ☐ **Segmented List** (List desired cities, states or zip codes below)

_____ _____ _____ _____

_____ _____ _____ _____

_____ _____ _____ _____

| For Profit Rates | Quantity | # of Uses | Price Per Use | Total |
|---|---|---|---|---|
| Full List of CFP® Professionals | | | $3,000 | |
| Segmented List of CFP® Professionals (up to 5000 names + 20 cents for each extra name) | | | $1,000 + 20 cents each over 5,000 | |
| List of CFP® Exam Applicants (additional $250 charge if segmented) | | | $1,500 +$250 if segmented | |
| **Non-Profit Rates** | **Quantity** | **# of Uses** | **Price Per Use** | **Total** |
| Full List of CFP® Professionals | | | $1,500 | |
| Segmented List of CFP® Professionals (up to 5000 names + 15 cents for each extra name) | | | $1,000 + 15 cents each over 5,000 | |
| List of CFP® Exam Applicants (additional $250 charge if segmented) | | | $750 +$250 if segmented | |

## SECTION IV: Conditions of Use

**I agree to comply with the following limitations on the use of CFP Board mailing lists:**

1. Mailings to CFP Board mailing lists must be beneficial to the CFP® professionals and/or CFP® exam applicants
2. A PDF of mail piece must be approved by CFP Board prior to list purchase. (Send by e-mail to: krussi@cfpboard.org)
3. Lists may only be used for a single mailing, unless purchased for multiple use
4. Lists can only be sent to a bonded mail house
5. All references to the CFP® certification in marketing materials will include the registration mark as follows: CFP®
6. All requests by CFP® professionals for removal from the mailing lists will be forwarded to CFP Board within 30 days
7. CFP Board will be indemnified for the improper use of any CFP Board mailing list by list purchaser
8. Failure to comply with the above terms may result in denial of future list requests and/or legal action

**Signature:** _____

## SECTION V: Bonded Mail House Information

**Bonded Mail-House:** _____

**Name of Contact:** _____

**Telephone:** _____ **Fax:** _____

**E-mail:** _____ **Website:** _____

## SECTION VI: Method of Payment

☐ **Check payable to CFP Board**

**Amount Paid: $**_____

**Check Number:** _____

☐ **Visa** ☐ **MasterCard** ☐ **Amex**

**Amount to Be Charged: $** _____

**Name on Card:** _____

**Card #:** _____ **Exp Date:** _____

E-mail completed order form with credit card info to krussi@cfpboard.org

Mail checks to: CFP Board, Attn: Kristen Russi, 1425 K Street NW #500, Washington, DC 20005