



## Registered Program Request for *Guide to CFP® Certification* Lists

CFP Board Registered Programs may request lists of individuals who have asked to receive CFP Board's *Guide to CFP® Certification* publication. The list contains individuals' first and last name and mailing address. Individuals' e-mail addresses are NOT provided. CFP Board reserves the right to deny any request for *Guide to CFP® Certification* lists.

### SECTION I: Contact Information

**Institution:** \_\_\_\_\_

**Program Title:** \_\_\_\_\_

**Mailing Address:** \_\_\_\_\_  
Street City State Zip

**Primary Contact:** \_\_\_\_\_

**Title:** \_\_\_\_\_ **Phone:** \_\_\_\_\_ **E-mail:** \_\_\_\_\_

**Secondary Contact:** \_\_\_\_\_

**Title:** \_\_\_\_\_ **Phone:** \_\_\_\_\_ **E-mail:** \_\_\_\_\_

### SECTION II: List Delivery

The list of individuals who have requested CFP Board's *Guide to CFP® Certification* publication is compiled and made available quarterly on or before the 15th of the months of January, April, July and October and includes individuals who have asked to receive this publication at some point within the previous quarter. Lists are distributed via CFP Board's Secure File Transfer site at <http://www.CFP.net/cfpsft/>. Following approval of this request, CFP Board will provide the primary and secondary contacts listed above with a login and username so that they and others within the organization may access this data.

To help guard individual contact information, only those contacts indicated above are provided login information. Further dissemination of username and login information is left to the discretion of the above contacts. If inquiries are made related to username and login information to CFP Board's Secure File Transfer page by an individual other than the primary or secondary contact, CFP Board will verify the legitimacy of this request with the primary or secondary contact indicated above.

### SECTION III: Conditions of Use of *Guide to CFP® Certification* publication request Lists from CFP Board

I agree to comply with CFP Board's Terms and Conditions of Registered Program registration and the following limitations on the use of CFP Board's *Guide to CFP® Certification* publication request lists:

- 1) The information contained in the list will not be disseminated further to any other entity.
- 2) All references to the certification in marketing materials will include the registration mark as follows: CFP®.
- 3) All requests made by individuals who have requested CFP Board's *Guide to CFP® Certification* publication for removal from the CFP Board's *Guide to CFP® Certification* publication request list will be forwarded to CFP Board in a timely manner.
- 4) CFP Board will be indemnified for the improper use of the *Guide to CFP® Certification* publication request list by the Registered Program and/or its agents.
- 5) Failure to comply with the above terms may result in termination of the above-listed Registered Program registration with CFP Board, pursuant to CFP Board's Terms and Conditions of Registered Program Registration.

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

### SECTION IV: Submission Instructions

**Mail** this form to:

Certified Financial Planner Board of Standards, Inc.  
Attn: Registered Programs  
1425 K Street NW #500  
Washington, DC 20005

**Fax** this form to 202-379-2299

**Email** this form to [education@cfpboard.org](mailto:education@cfpboard.org)