



## SECTION V: Conditions of Use of CFP® Exam Applicant Lists from CFP Board

I agree to comply with CFP Board's Terms and Conditions of Review Course Provider registration and the following limitations on the use of CFP® exam applicant lists:

- 1) Any CFP® exam applicant list received from CFP Board will be used for a single mailing to promote a CFP® exam review course registered with CFP Board.
- 2) The information contained in the list will not be disseminated to any other entity.
- 3) Any CFP® exam review course registered with CFP Board may be described as having been "accepted by CFP Board" as a review course provider. CFP® exam review course providers registered with CFP Board may NOT be advertised as "approved by CFP Board."
- 4) All references to the certification in marketing materials will include the registration mark as follows: CFP®.
- 5) All requests made by CFP® exam applicants for removal from the CFP® exam applicant lists will be forwarded to CFP Board in a timely manner.
- 6) CFP Board will be indemnified for the improper use of the CFP® exam applicant list by the Review Course provider and/or its agents.
- 7) Failure to comply with the above terms may result in termination of the above-listed Review Course Provider's registration with CFP Board, pursuant to CFP Board's Terms and Conditions of Review Course Provider Registration.

Signature:

Date:

## SECTION VI: Method of Payment

Please complete the following payment information.

Payment Amount: *(If a segmented list is requested, CFP Board will notify you of the exact payment amount after reviewing your request)*

Check (Made payable to CFP Board) Check Number:

VISA                      MasterCard                      American Express

Name (as it appears on the card):

Card #:    Expiration Date:

## SECTION VII: Submission Instructions

**Mail** this order form and payment by check to:

Certified Financial Planner Board of Standards, Inc.  
Nick Weaver, Marketing Coordinator  
1425 K Street, NW, Suite 500  
Washington, D.C. 20005

**Fax** order with credit card information to 202-379-2299.

**E-mail** order with credit card information to [lists@CFPBoard.org](mailto:lists@CFPBoard.org)

For additional information, call 202-379-2257 or e-mail [lists@CFPBoard.org](mailto:lists@CFPBoard.org).

**PLEASE ALLOW 1 WEEK FOR CFP BOARD TO PROCESS YOUR REQUEST**