



Copyright Permission Request and Approval Form

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PLEASE ALLOW 10 BUSINESS DAYS FOR CFP BOARD TO PROCESS YOUR REQUEST

SECTION I: Contact Information

Name: _____ Email: _____
First name Middle initial Last name Suffix

Organization/Company: _____

Address: _____

Telephone: _____ Fax: _____

SECTION II: CFP Board Content Identification

I hereby request nonexclusive permission to reprint/reproduce the following content.

Exact name of the CFP Board publication you wish to reprint/reproduce: _____

Where did you find this CFP Board publication? *(Select only one of the following options)*

CFP Board's website. Print the exact URL for the webpage on which the publication appears:

Hard copy material you received from CFP Board.

Email you received from CFP Board.

Other. Please specify: _____

Do you plan to use the publication in its entirety? No Yes

Do you plan to use only sections of the publication? No Yes *If Yes, please identify the specific sections of the publication that you plan to use:* _____

SECTION III: Use of CFP Board Content

Provide a brief description of how you plan to use the content identified in Section II: _____

Please indicate how you propose to use the content identified in Section II.

Electric/Online only

Print only

Electronic/Online and Print

Please indicate the type of use you plan for the content identified in Section II.

Commercial Use *(for distribution in a for-profit or business setting, including reproduction on a company website)*

Academic Use *(distributing for educational or informational purposes, including reproduction on a university website)*

Other purpose *(please explain:)* _____

Estimated date(s) of publication, posting or usage: _____

CFP Board Copyright Permission Request and Approval Form (continued)

SECTION IV: Terms and Conditions of Agreement

Requestor agrees that if permission is granted, all of the following terms and conditions shall apply:

1. Permission granted shall extend only to the reprinting/reproducing of the material indicated on this permission form, in the specific edition of the work as described, and permission shall not extend to use in any special, abridged, reprinted or revised edition of the work.
2. Permission extends to the distribution of the work in the United States only.
3. No changes shall be made, additions to or deletions from the reprinted/reproduced material.
4. The most current edition of the reprinted/reproduced material(s) shall be maintained and published by requestor with the appropriate effective dates listed.
5. Permission shall terminate two (2) years after this Copyright Permission is granted.
6. A fee may be charged, at the sole discretion of CFP Board, and an invoice (if any) detailing the anticipated fee will be provided and paid in advance of permission being granted.
7. Requestor agrees to indemnify and hold harmless CFP Board for any loss or damage, including reasonable attorney fees, CFP Board may incur, directly or indirectly, by reason of Requestor's use and/or reprinting of materials identified above.

Acknowledgement

I agree to the terms and conditions of Copyright Permission as stated above and understand that I may not use website content or other published materials owned by CFP Board without written confirmation from CFP Board that Copyright Permission has been granted.

Requestor

Name (please print): _____ Title: _____

Signature: _____ Date: _____

The information collected in this form will be used by CFP Board to reply to your Copyright Permission Request. CFP Board may also use the contact information collected through this form to send updates regarding CFP Board's copyright policies or for other purposes, including communications to third parties. To opt out of communications not directly related to your Copyright Permission Request, check the "Opt-out" box or notify CFP Board of your request by email to mail@cfpboard.org or fax to 202-379-2299. Opt-out

SECTION V: Submission Instructions

Once you have completed the form, please submit to CFP Board via the contact information below:

CFP Board
Attn: Compliance
1425 K Street NW #500
Washington, DC 20005
Fax: 202-379-2299
Email: compliance@cfpboard.org

PLEASE ALLOW 10 BUSINESS DAYS FOR CFP BOARD TO PROCESS YOUR REQUEST

SECTION VI: Approval

— FOR CFP BOARD USE ONLY —

Permission to use the material identified on this application is:

Denied for the following reason(s): _____

Denied until the following information is supplied: _____

Granted, provided the following Copyright Notice is used:

Copyright © _____, Certified Financial Planner Board of Standards, Inc. All rights reserved.

Please be advised that this agreement is good for a period of two years and will expire on _____. If you wish to renew this agreement, we recommend that you contact CFP Board three months prior to the expiration date.