

CFP BOARD REPORT

News From Financial Planning's Professional Regulatory Organization

News Bullets

- **CEO Job Description Posted to Web Site**
- **CFP Board's eNewsletter Informs the Public**
- **Board of Examiners Registers 8 New Programs**
- **CFP® Certificants Can Download Logo Artwork from CFP Board's Web Site**

CEO Job Description Posted to Web Site

A description of the qualifications and attributes the Board of Governors is currently looking for in candidates for the job of CEO has been posted on CFP Board's Web site. The firm of Heidrick & Struggles is conducting the search. To read the job description, go to www.CFP.net/certificants.

CFP Board's eNewsletter Informs the Public


It's Your Turn, CFP Board's newest tool to educate the public, provides valuable financial planning information, tips, consumer alerts and other resources to consumers via an electronic newsletter. The eNewsletter's second issue was sent to more than 13,000 individuals in February. To view the latest issues of *It's Your Turn*, go to the "Publications and Resource Library" section of www.CFP.net/learn.

You and your clients can sign up for the eNewsletter at www.CFP.net/learn.

Board of Examiners Registers 8 New Programs

CFP Board's subsidiary Board of Examiners has registered eight new financial planning education programs at six institutions, bringing the total of CFP Board-Registered Programs to 292 at 178 colleges and universities nationwide. For more information, read the press release at www.CFP.net/media.

CFP® Certificants Can Download Logo Artwork from CFP Board's Web Site

CFP® certificants interested in using logos of the CFP certification marks on their stationery, business cards, brochures and Web sites, can download images from CFP Board's Web site. CFP Board offers two logos: the  mark and artwork for all three CFP certification marks with the tagline. In addition, information on how to insert the ® and ™ trademark symbols into Word documents for use with the CFP® mark and CERTIFIED FINANCIAL PLANNER™ mark can be found in this same section. The files are available in a variety of sizes, colors and file types.

(continued on other side)



CERTIFIED FINANCIAL PLANNER™

CFP®

The certification marks above are owned by Certified Financial Planner Board of Standards Inc. and are awarded to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Board of Governors

BOARD CHAIR

David H. Diesslin, CFP®
Diesslin and Associates

BOARD CHAIR-ELECT

Glenn M. Pape, CFP®
Ernst & Young

BOARD MEMBERS

Fredrick E. Adkins III, CFP®
The Arkansas Financial Group

Don M. Blandin
American Savings Education Council

Ellyn L. Brown, Esq.
Brown & Associates, Chartered Attorneys

Marilyn Capelli Dimitroff, CFP®
Capelli Financial Services

Barton C. Francis, CFP®
PricewaterhouseCoopers

J. Nicholas Georgis
Charles Schwab Institutional

Vickie L. Hampton, CFP®
Texas Tech University

Kyra H. Morris, CFP®
Morris Financial Concepts

George Muñoz, CFP®
Muñoz Investment Banking Group

Karen P. Schaeffer, CFP®
Schaeffer Financial

David G. Strege, CFP®
Syverson, Strege, Sandager & Co.

Stewart H. Welch III, CFP®
The Welch Group

CFP Board is directed by a Board of Governors which oversees four subsidiary boards. The Board of Governors establishes policy and oversees all CFP Board activities. Members serve three-year terms and a majority of Governors must be CFP® certificants. The CEO serves *ex-officio* as a Governor but does not have voting rights.

CFP Board Report is published to inform CFP® certificants, the profession and the public of CFP Board activities, policies and initiatives. A nonprofit professional regulatory organization, CFP Board fosters professional standards in personal financial planning so that the public values, has access to and benefits from competent and ethical financial planning. CFP Board does not discriminate in certification opportunities or practices on the basis of race, color, religion, sex, national origin, disability or any other characteristic protected by law.

Download Logos (cont.)

Recommendations: if you are working in a program such as Microsoft Word, download a TIF file; if you are working with a print vendor and need the best print resolution, download an EPS file; if you need an image for your Web site, download a GIF file.

To download the graphic files and for instructions on inserting the trademark symbols, log in at www.CFP.net/login.

The mark is a distinctive visual symbol that indicates to the public that you have met financial planning's highest certification standard. Following trademark guidelines when using any of the CFP certification marks in your materials protects the marks and the standards they convey. For more information about using the CFP marks correctly, view the *Guide to the Use of the CFP Certification Marks* at the "How to Use the CFP Marks" section of www.CFP.net/certificants.