

CFP BOARD REPORT

News From Financial Planning's Professional Regulatory Organization

News Bullets

- **CFP Board Awards its Second Academy of Finance Scholarship**
- **Look for the CFP® Practitioner Job Analysis Survey Next Month**
- **Volunteer Opportunities with CFP Board**
- **Number of CFP Board-Registered Programs Tops 300**
- **Order the *Why You Should Choose a CERTIFIED FINANCIAL PLANNER™ Practitioner Brochure***
- **Some Exceptions to the Rules for Using the CFP Certification Marks**

CFP Board Awards its Second Academy of Finance Scholarship

CFP Board awarded its second annual National Academy of Finance scholarship to Herman M. Ayvazyan, a high school senior from Portsmouth, R.I. Applicants were evaluated on criteria including grade point average, original essays, participation in the Academy of Finance program and interest in pursuing a career in financial services. The \$1,000 scholarship was presented in honor of Rick Adkins, CFP®, past chair of CFP Board's governing body. CFP Board works with the National Academy Foundation to increase awareness of the benefits of personal financial planning and the potential career opportunities within the profession. For more information, read the press release at www.CFP.net/media.

Look for the CFP® Practitioner Job Analysis Survey Next Month

Final preparations are being made for the introduction of the CFP® Practitioner Job Analysis Survey in July. The survey is the next step in CFP Board's Job Analysis Study, carried out every five years, which is used to identify the tasks typically performed by CFP practitioners and the knowledge, skills and abilities necessary to competently perform those tasks. If you are a CFP practitioner, please take a few moments to complete the online survey. Your input is invaluable and will help shape the standards of competency required of future CFP certificants.

Volunteer Opportunities with CFP Board

CFP Board's efforts to educate the public about the benefits of financial planning and our goal of ensuring that consumers have access to competent and ethical financial planners could not be accomplished were it not for our many volunteers who donate their time and talents. Volunteer opportunities range from exam development and government opportunities to consumer education and diversity and education outreach opportunities. If you are interested in helping us achieve these goals, you can learn more about volunteer opportunities with CFP Board and submit a volunteer registration form at the "Opportunities" section of www.CFP.net/volunteers.

Number of CFP Board-Registered Programs Tops 300

CFP Board's Board of Examiners registered 12 new financial planning education programs at nine institutions, bringing the total of CFP Board-Registered Programs to 301 at 183 colleges and universities nationwide. For more information, read the press release at www.CFP.net/media.

(continued on next page)



CERTIFIED FINANCIAL PLANNER™



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.

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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.

Order the *Why You Should Choose a CERTIFIED FINANCIAL PLANNER™ Practitioner Brochure*

CFP Board's brochure, *Why You Should Choose a CERTIFIED FINANCIAL PLANNER™ Practitioner*, is one of several brochures included in our *Financial Planning Resource Kit* which provides consumers with information about financial planning and how to choose a financial planner. The *Why Choose* brochure points out the high standards of competency and ethics met by CFP® professionals. In 2003, CFP certificants ordered more than 160,000 *Why Choose* brochures and distributed them to the public. Many CFP certificants provide these brochures to consumers through mailings or when they make presentations to groups. Order this or other consumer publications, including the *Financial Planning Resource Kit*, by calling 800-487-1497 or by downloading an order form by clicking on the "Brochure Order Form" link at www.CFP.net/certificants. To review the content of the publications in PDF format click on the "Publications & Resource Library" link at www.CFP.net/certificants.

Some Exceptions to the Rules for Using the CFP Certification Marks

CFP Board appreciates the attention CFP® certificants and other stakeholders pay to using the CFP certification marks correctly. As you know, the CFP marks are trademarks and must be used in compliance with trademark law; these rules are outlined in the *Guide to Use of the CFP Certification Marks*. CFP Board has made every effort to make sure these rules are clear and easy to follow. However, there are some exceptions to the rules that bear repeating:

RULE: The CERTIFIED FINANCIAL PLANNER™ mark must be used as an adjective with an approved noun, e.g., "He is a CERTIFIED FINANCIAL PLANNER™ professional."

EXCEPTION: An exception applies when this mark is used in CFP Board's tagline, e.g., "CFP®, CERTIFIED FINANCIAL PLANNER™ and the CFP (with flame logo)® are certification marks owned by CFP Board."

RULE: The CFP® mark must be used as an adjective with an approved noun, e.g., "John Doe is a CFP® certificant."

EXCEPTION: An exception applies when this mark is used immediately following an individual's name in text or on business cards or letterhead, e.g., "John Doe, CFP®" or when used in CFP Board's tagline.

Remember, if you have questions regarding marks use, consult the *Guide to Use of the CFP Certification Marks* by clicking on the "How to Use the CFP Marks" link at www.CFP.net/certificants. You can also contact CFP Board's trademark department for further clarification by calling 800-487-1497.