

CERTIFIED FINANCIAL PLANNER  
BOARD OF STANDARDS, INC.

## Marketing Strategies for CFP Board-Registered Programs

CFP Board's  
Communications and Marketing Team

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## CFP Board's Communications and Marketing Staff

- **Tim Stifel**  
Director, Stakeholder Communications
- **Anne Pluta**  
Marketing Manager
- **Nick Weaver**  
Marketing Coordinator

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## Marketing Materials on CFP.net

[www.CFP.net/teamup/communicationtools.asp](http://www.CFP.net/teamup/communicationtools.asp)

- Publications
- Fliers
- Presentation Materials
- Advertisement Templates
- CFP Board Letters to Students and Graduates
- Mailing Lists




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## Marketing Materials on CFP.net

[www.CFP.net/teamup/communicationtools.asp](http://www.CFP.net/teamup/communicationtools.asp)



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## Marketing Materials on CFP.net

### Publications:

- Guide to CFP® Certification
- Your Career as a CERTIFIED FINANCIAL PLANNER™ Practitioner
- Why You Should Choose a CERTIFIED FINANCIAL PLANNER™ Practitioner
- CFP Board's Standards of Professional Conduct



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## Marketing Materials on CFP.net

### Fliers:

- Steps to CFP® Certification
- About CFP Board
- High School Informational Flier



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## Marketing Materials on CFP.net

### PowerPoint Slideshow Template:

- Introduction to Financial Planning
- Current CFP® Certificant Demographics
- Career Opportunities
- CFP® Certification Requirements
- Updated Data from CFP Board's Latest Surveys



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## Marketing Materials on CFP.net

### Advertisement Templates:

- Several concepts and sizes to choose from
- Templates may be customized with your program's information
- Ad copy and concepts may be borrowed for use by your program (*remember to send non-template ads to [trademark@CFPBoard.org](mailto:trademark@CFPBoard.org) for CFP Board review*)



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## Marketing Materials on CFP.net

### CFP Board Letters:

- Congratulate incoming students for their decision to enroll in your program and pursue a rewarding career in financial planning
- Congratulate graduating students on their accomplishments and direct them to take the next steps toward CFP® certification
- Letters can be customized with student names (for details, contact Anne Pluta at [marketing@CFPBoard.org](mailto:marketing@CFPBoard.org))



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## Marketing Materials on CFP.net

### Mailing Lists:

- Quarterly mailing lists of individuals who have requested a copy of CFP Board's *Guide to CFP® Certification* booklet
- Each list contains mailing addresses for hundreds of individuals with interest in CFP® certification
- The lists are free of charge and may be used for the express purpose of promoting your program
- Download a list request form or contact [education@CFPBoard.org](mailto:education@CFPBoard.org) to request a form

CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC. 1425 K Street, NW, Suite 500, Washington, DC 20005  
P: 800-487-1487 F: 202-379-2299  
E: [education@CFPBoard.org](mailto:education@CFPBoard.org) W: [www.CFP.net](http://www.CFP.net)

#### 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 individual first and last names and mailing address. Individual e-mail addresses are NOT provided. CFP Board reserves the right to deny any request for *Guide to CFP® Certification* lists.

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## Marketing Materials on CFP.net

Electronic versions of all these marketing materials can be downloaded for no cost

- *Guide to CFP® Certification* booklets available to Registered Programs for no cost (up to 50)
- Printed editions of selected publications and fliers available for purchase

[www.CFP.net/teamup/communicationtools.asp](http://www.CFP.net/teamup/communicationtools.asp)

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## Other Resources

### Market Research Reports:

- 2009 Consumer Market Research
- 2009 Certificant Study

### Use of CFP Board Copy:

- Add copy from [www.CFP.net](http://www.CFP.net) or any printed piece to your website or brochure

CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC. 1425 K Street, NW, Suite 500, Washington, DC 20005  
P: 800-487-1487 F: 202-379-2299  
E: [compliance@CFPBoard.org](mailto:compliance@CFPBoard.org) W: [www.CFP.net](http://www.CFP.net)

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

#### SECTION 1: Contact Information

Name: \_\_\_\_\_ E-mail: \_\_\_\_\_  
Organization/Company: \_\_\_\_\_  
Address: \_\_\_\_\_

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## Marketing Materials in the Pipeline

### Graduate Press Release:

- Announces Registered Program graduate is eligible to sit for the CFP® Exam

### Newly Certified Press Release:

- Announces Registered Program graduate has earned CFP® certification

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## Marketing Materials in the Pipeline

### Advertisement Template:

- "Stand Out" Ad targets current financial services professionals
- Announces semester start
- Color or Black and White Templates are available
- May be customized with your program's information and branding

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## Marketing Materials in the Pipeline

### Prospecting Flier:

- May be customized with your program's information and branding
- May also be used as an ad or a poster
- Back of the flier may be used to announce class schedule, highlight a professor, etc.



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## State of Registered Program Marketing

### Survey Findings:

- Program Demographics
- Marketing Campaign Trends
- Advertising Trends
- Internet Trends
- Use of CFP Board Material

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## Marketing Your Registered Program

*Questions?*

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