

## COPYRIGHT PERMISSION REQUEST AND APPROVAL FORM

Use this form to request permission from Certified Financial Planner Board of Standards, Inc. (CFP Board) for the non-exclusive right to use website content or other published materials owned by CFP Board. Request permission online at: [CFP.net/copyrightpermission](http://CFP.net/copyrightpermission)

PLEASE ALLOW 20 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 non-exclusive permission to reprint/reproduce the following content.

Exact name of the CFP Board content you wish to reprint/reproduce: \_\_\_\_\_

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

CFP Board's website (If so, print the exact URL for the webpage on which the content appears:)

Hard copy material you received from CFP Board. (If so, please attach a copy of the document.)

Email you received from CFP Board. (If so, please attach a copy of the email.)

Other.

Please specify (please attach a copy):

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

Do you plan to use only sections of the content?  No  Yes

If Yes, please identify the specific sections of the content 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: \_\_\_\_\_

## 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. CFP Board reserves the right to revoke granted copyright permission at any time in CFP Board's sole discretion.
7. 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.
8. 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.
9. Requestor agrees to include the following attribution statement in close proximity to the excerpts that are to be reproduced ("Excerpts"), or such other attribution statement approved by CFP Board: "© (year) Certified Financial Planner Board of Standards, Inc. All rights reserved. Reprinted with permission."
10. Requestor agrees to refrain from displaying the Excerpts in a critical or unfavorable light, nor will the document in which the Excerpts appear characterize CFP Board or the CFP Board material in a negative light.

### 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: \_\_\_\_\_

- I acknowledge that the information collected in this form will be used by CFP Board to reply to my Copyright Permission Request, and that 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, in accordance with CFP Board's Privacy Policy. I understand that to opt out of communications not directly related to my Copyright Permission Request, I may notify CFP Board of my request by email at [mail@cfpboard.org](mailto:mail@cfpboard.org) or through one of the other methods identified in the Privacy Policy.

## SECTION V: SUBMISSION INSTRUCTIONS

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

CFP Board  
Attn: Trademark  
1425 K Street NW #800, Washington, DC 20005

Fax: 202-379-2299  
Email: [trademark@cfpboard.org](mailto:trademark@cfpboard.org)

**PLEASE ALLOW 20 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. Reprinted with permission.

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.

Approved: \_\_\_\_\_ Approval Date: \_\_\_\_\_  
                    Initials