

### **Paralegal, Intellectual Property & Trademarks**

The Certified Financial Planner Board of Standards (“CFP Board”) - headquartered in Washington, D.C.-is the certifying body for financial planning professionals. It is a non-profit organization that fosters professional standards in personal financial planning through its setting and enforcement of the education, examination, experience, ethics, and other requirements for the CFP certification.

This position normally operates in a professional office environment. However, remote work may take place due to COVID-19 and any other pandemic or for any reason as determined by CFP Board’s CEO.

#### **General Function:**

CFP Board seeks a highly motivated Paralegal, Intellectual Property & Trademarks to support the efforts to protect the CFP Board certification trademarks and other intellectual property. The successful candidate will manage the administration of the contract development and storage process and track contract-related deadlines; manage the storage and retrieval of corporate documents; and take minutes of Council, Commission, and Committee meetings.

The ideal candidate will embrace open collaboration, possess intellectual curiosity, and help the organization deliver results towards fulfilling our mission.

#### **Essential Functions**

- Collaborates with the General Counsel to manage and protect CFP Board’s Intellectual Property
- Responds to inquiries concerning the proper use of CFP Board’s trademarks
- Investigates allegations of misuse, unauthorized use, and infringement of the certification marks to ensure that all matters are fully resolved in accordance with CFP Board’s procedures
- Audits former CFP® professionals for potential trademark misuse
- Provides training and/or guidance to staff, CFP® professionals, registered program providers, continuing education providers, and the general public on proper trademark use
- Protects CFP Board’s copyrighted materials and evaluates and processes requests for permission to use CFP Board’s copyrighted materials by CFP® professionals, educational programs, and the general public
- Ensures periodic registration with the U.S. Patent and Trademark Office and U.S. Copyright Office of CFP Board’s intellectual property materials
- Monitors trademark filings and applications and makes initial recommendations on trademark filings, oppositions, cancellations, and enforcement
- Manages the acquisition and maintenance of CFP Board’s domain name portfolio
- Ensures periodic corporate and regulatory filings are made and elevate issues to General Counsel as needed
- Manages the administration of the contract development and storage process and tracks contract-related deadlines
- Manages the administration of contract requests, the delivery of executed contracts, and the tracking of contract-related deadlines

- Maintains a current, accurate and comprehensive contract database, including copies of all contracts
- Attends meetings of CFP Board Councils, Committees, and Commissions, and develops meeting minutes
- Ensures compliance with the Document Retention and Destruction Policy
- Conducts legal research as needed
- Performs other duties as assigned

**Background/Skills/Abilities Preferred**

- Bachelor's degree and/or a paralegal certificate
- Minimum 4+ years of Trademark experience
- Knowledge and experience working with the United States Patent and Trademark Office
- Demonstrated experience and expertise in intellectual property and corporate contracts
- Proficiency in legal software, including Westlaw, BrokerCheck, Clio, Pacer
- Proficiency with Microsoft Office and experience in association management systems, NetForum preferred
- Demonstrated ability to deal with confidential/sensitive matters in a discrete and professional manner
- Excellent attention to detail, strong organizational and prioritization skills with the ability to meet deadlines in a fast-paced environment
- Ability to write and communicate in a legal environment
- Ability to analyze relevant data and present it in a logical and compelling manner; critical thinking is essential
- Strong customer service skills

To apply, send your resume and one-page letter summarizing your interest, qualifications, and salary expectations. Please reference the Paralegal, Intellectual Property & Trademarks position in your cover letter. Email your application to [humanresources@cfpboard.org](mailto:humanresources@cfpboard.org), Attention: Director, Human Resources, CFP Board, 1425 K Street NW, Suite 800, Washington, DC 20005.

CFP Board believes that diversity of experience and perspective are strengths and seeks to continue to grow a highly committed, skilled, and collaborative staff.