

COPYRIGHT PERMISSION REQUEST AND APPROVAL FORM

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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 the territories where you would like to use this content (insert United States if in the United States):

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 COPYRIGHT PERMISSION

Requestor agrees that if permission is granted, the following Terms and Conditions of Copyright Permission shall apply:

1. Permission shall extend only to the specific CFP Board content indicated on this permission form (the "Work"), in the specific edition of the Work indicated, and permission shall not extend to any special, abridged, reprinted or revised editions of the Work, unless specifically indicated on this permission form.
2. Permission shall extend only to the specific use of the Work indicated on this permission form. Use of the Work in any other manner requires separate permission.
3. Permission extends only to the specific territory (or territories) designated on this permission form.
4. No changes, modifications or alterations may be made to the Work absent CFP Board's express, written permission.
5. Permission shall terminate two (2) years after permission is granted.
6. CFP Board reserves the right to revoke permission to use the Work at any time, at CFP Board's sole discretion.
7. A fee may be charged, at the sole discretion of CFP Board, for the use of the Work, in which case an invoice detailing the fee will be provided and must be paid in advance of permission being granted.
8. Requestor agrees not to use the Work in a manner that infringes or violates the rights of CFP Board or any third party or any applicable regulation or law, and 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 of the Work.
9. Requestor agrees that, if permission is granted to use an excerpt of a larger work ("Excerpt"), Requestor will include the following attribution statement in close proximity to the Excerpt, unless a different attribution statement is approved by CFP Board in writing: "© (year of publication) Certified Financial Planner Board of Standards, Inc. All rights reserved. Reproduced with permission."
10. Requestor agrees to refrain from displaying the Work or any Excerpts in a manner that displays CFP Board or the Work, including any Excerpts, in a critical or unfavorable light.
11. Requestor may not license or sell the Work or any portion thereof or transfer the copyright permission granted by CFP Board to another party. Requestor acknowledges that its permission to use the Work is non-exclusive, meaning CFP Board may grant the same rights to other parties.
12. Requestor acknowledges CFP Board's exclusive ownership of the Work and understands that Requestor acquires no right, title, or interest in the Work, other than the limited right to use the Work pursuant to these Terms and Conditions of Copyright Permission.

CFP Board reserves the right to grant permission under separate terms and conditions provided by CFP Board, in which case such separate terms and conditions shall govern your use of the relevant CFP Board content.

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 content 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 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

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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:
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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