

**CFP BOARD**

# **GUIDE TO USE OF THE CFP BOARD CERTIFICATION MARKS**

DECEMBER 2020

# PURPOSE AND TABLE OF CONTENTS

CFP Board developed this *Guide to Use of the CFP Board Certification Marks* (“Guide”) for the purpose of providing instruction, and to assist CFP® professionals in making proper trademark use of CFP Board’s certification marks. This Guide is intended to assist CFP® professionals in featuring the marks in a compliant manner in print, multimedia and online communications, including business cards, letterhead, advertising, presentation materials, promotional literature, and signage. CFP Board’s certification marks may be used only by those who have been authorized to do so after meeting CFP Board’s certification requirements. The marks must always be used in accordance with this Guide, CFP Board’s *Terms and Conditions of Certification and Trademark License*, and any additional rules presented by CFP Board.

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## THE GUIDE APPLIES TO THE FOLLOWING CERTIFICATION WORD MARKS AND LOGO:



CFP® certification word mark



CFP® mark (with plaque design) certification logo

**CERTIFIED FINANCIAL PLANNER™**

CERTIFIED FINANCIAL PLANNER™ certification word mark

## SECTION 1: INTRODUCTION TO GUIDE

CFP Board's certification marks (the "Certification Marks") identify specific individuals as being professionals who have met the certification standards required by CFP Board, including completing the initial and ongoing education, examination, experience and ethics requirements. A CFP® professional is therefore authorized to use the Certification Marks in conjunction with his or her name to demonstrate this accomplishment, as long as the CFP® professional abides by the rules outlined in this Guide, CFP Board's *Terms and Conditions of Certification and Trademark License*, and any additional rules presented by CFP Board.

These rules are important to maintaining the value and integrity of the Certification Marks. If the Certification Marks are used improperly, then the Certification Marks could be weakened. This would be detrimental to the public who perceive the Certification Marks as indicating that the persons displaying them have met certain high standards.

CFP Board pursues misuse and unauthorized use of the Certification Marks to ensure those who use the marks have met the certification requirements and are using the marks properly. As a CFP® professional you have agreed to adhere to the *Terms and Conditions of Certification and Trademark License* and other rules set by CFP Board. Adhering to this Guide is a condition precedent for using the Certification Marks. Thus, if you fail to follow this Guide, CFP Board reserves its right to revoke your CFP® certification.

Proper usage of the Certification Marks also is a crucial part of communications from CFP® professionals to current and prospective financial planning clients. When properly used, the marks represent high standards and a CFP® professional's commitment to upholding these standards.

Please become familiar with this Guide and apply its rules and guidelines when featuring the Certification Marks. If you need further assistance, or would like CFP Board to review business materials that you are developing that feature the marks, feel free to contact us at 800-487-1497 or [trademark@cfpboard.org](mailto:trademark@cfpboard.org).

Thank you for your assistance in positioning the Certification Marks as the recognized standard of excellence for competent and ethical personal financial planning.

## SECTION 2: GUIDELINES FOR PROPER USE OF THE WORD MARKS (CFP® MARK AND CERTIFIED FINANCIAL PLANNER™ MARK)

GUIDELINE	PROPER USE	MISUSE
<p>When used in a sentence, the CFP® mark and CERTIFIED FINANCIAL PLANNER™ marks should always be used as adjectives, not nouns. They always must be followed by one of CFP Board’s six approved nouns. Approved nouns should be spelled out, not truncated or abbreviated.</p> <p><b>Approved Nouns:</b> professional, practitioner, certificant, certification, mark, exam.</p>	<p>Jane Doe is a CFP® certificant</p> <p>Jane Doe has obtained her CFP® certification</p>	<p>John Doe is a CFP®</p> <p>Jane Doe passed the CFP® test three years ago</p>
<p>CFP® mark and CERTIFIED FINANCIAL PLANNER™ mark must be clearly associated with the individual certified by CFP Board.</p>	<p><b>Use on Business Cards, Letterhead, Signature Blocks, Email Signature Blocks:</b></p> <ul style="list-style-type: none"> <li>• Jane Doe, CFP®</li> <li>• John Doe, CERTIFIED FINANCIAL PLANNER™</li> </ul> <p><b>Use in text:</b></p> <ul style="list-style-type: none"> <li>• Jane Doe is a CFP® professional.</li> <li>• John Doe became a CERTIFIED FINANCIAL PLANNER™ practitioner two years ago.</li> </ul>	<p><b>Use on Business Cards, Letterhead, Signature Blocks, Email Signature Blocks:</b></p> <ul style="list-style-type: none"> <li>• ABC Firm, with CFP® professionals</li> <li>• CERTIFIED FINANCIAL PLANNER™ professionals, XYZ Firm</li> </ul> <p><b>Use in text:</b></p> <ul style="list-style-type: none"> <li>• ABC Financial has CFP® professionals.</li> <li>• XYZ Firm has CERTIFIED FINANCIAL PLANNER™ professionals.</li> </ul>
<p>CFP® mark must appear in all capital letters and without periods between the letters.</p>	<p>John Doe is a CFP® professional</p> <p>Jane Doe is a CFP® professional</p>	<p>John Doe is a Cfp® professional</p> <p>Jane Doe is a C.F.P.® professional</p>
<p>CERTIFIED FINANCIAL PLANNER™ mark must always appear in all capital letters, or “small caps” font.</p>	<p>John Doe is a CERTIFIED FINANCIAL PLANNER™ professional.</p> <p>Jane Doe is a CERTIFIED FINANCIAL PLANNER™ professional.</p>	<p>John Doe is a Certified Financial Planner™ professional.</p> <p>Jane Doe is a certified financial planner™ professional.</p>
<p>CFP® mark must always appear with a superscripted ® symbol. Exceptions apply when a superscripted mark is not possible.</p>	<p><b>Proper Use:</b> Jane Doe is a CFP® professional.</p> <p><b>Alternative Proper Use (where superscript is not possible):</b> Jane Doe is a CFP(R) certificant.</p>	<p>Jane Doe is a CFP professional.</p> <p>Jane Doe, CFP</p>
<p>CERTIFIED FINANCIAL PLANNER™ mark must always appear with a superscripted ™ symbol. Exceptions apply when a superscripted mark is not possible, as on social media sites.</p>	<p><b>Proper Use:</b> Jane Doe obtained her CERTIFIED FINANCIAL PLANNER™ certification in 2015.</p> <p><b>Alternative Proper Use (where superscript is not possible):</b> Jane Doe obtained her CERTIFIED FINANCIAL PLANNER(TM) certification in 2015.</p>	<p>Jane Doe obtained her CERTIFIED FINANCIAL PLANNER certification in 2015.</p> <p>John Doe is a CERTIFIED FINANCIAL PLANNER® practitioner.</p>

## SECTION 2: GUIDELINES FOR PROPER USE OF THE WORD MARKS (CFP® MARK AND CERTIFIED FINANCIAL PLANNER™ MARK)

GUIDELINE	PROPER USE	MISUSE
Font of Registration “®” and Trademark “™” must be large enough to be legible.	John Doe is a CFP® professional	John Doe is a CFP professional
	Jane Doe is a CERTIFIED FINANCIAL PLANNER™ professional	Jane Doe is a CERTIFIED FINANCIAL PLANNER professional
Use on resumes, cover letters and job applications by individuals who have completed the education requirement within the past five years. If the individual is not certified within five years of completing the education requirement, then this use must cease.	Jane Doe, Candidate for CFP® certification	Jane Doe soon will be a candidate for CFP® certification.
	John Doe, Candidate for CFP® certification	John Doe is taking university CFP® certification courses
When the mark immediately follows the certificant’s name, a comma must be inserted between the name and the mark, even if the mark falls on the line below the certificant’s name.	Jane Doe, CFP®	John Doe CFP®
	John Doe, CERTIFIED FINANCIAL PLANNER™	Jane Doe CERTIFIED FINANCIAL PLANNER™
CFP® mark must not be used as a parenthetical abbreviation for the CERTIFIED FINANCIAL PLANNER™ mark. The CERTIFIED FINANCIAL PLANNER™ mark must not be used as a parenthetical expansion of the CFP® mark.	John Doe is a CFP® practitioner.	John Doe is a CERTIFIED FINANCIAL PLANNER™ (CFP®) professional.
	John Doe is a CERTIFIED FINANCIAL PLANNER™ practitioner.	John Doe is a CFP® (CERTIFIED FINANCIAL PLANNER™) professional.
Marks may not be used as a plural or possessive word.	John Doe and Jane Doe are CFP® practitioners.	Jane and John Doe are CFPs®.
	Jane Doe and John Doe are both CERTIFIED FINANCIAL PLANNER™ professionals.	Jane Doe offers CFP’s® financial planning services.
Certificants may not own or use an e-mail address, internet domain name, or hashtag that includes the CFP® mark.	No use is permissible.	johndoecfp@gmail.com
		jdoe@johndoecfp.com
		www.johndoecfp.com
		#jdoecfp
		@johndoecfp
Certificants may not own or use an e-mail address, or internet domain name, hashtag that includes the CERTIFIED FINANCIAL PLANNER™ mark.	No use is permissible	Jdcertifiedfinancialplanner@gmail.com
		Jdoe@janecertifiedfinancialplanner.com
		www.janedoecertifiedfinancialplanner.com
		#janecertifiedfinancialplanner
		@jdoecertifiedfinancialplanner

## SECTION 3: GUIDELINES FOR PROPER USE OF THE CFP® MARK (WITH PLAQUE DESIGN) LOGO

The CFP® (with plaque design) certification logo is comprised of three components: the letters “CFP,” the superscripted ® registration symbol, and the outer box (plaque design). These three components must be used together as one unit at all times to protect the visual integrity of the mark. The logo may be downloaded by logging-in at [CFP.net/marks](https://www.cfp.net/marks).



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**GUIDELINE:** The CFP® (with plaque design) certification logo must be clearly associated with and used in close proximity to the name of the CFP® certificant.

**Proper Use:** Jane Doe, 

**Misuse:** ABC Financial Inc., a  firm

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**GUIDELINE:** All reproductions of the logo must be made from original reproduction artwork available for download from CFP Board’s website at [CFP.net/mark](https://www.cfp.net/mark) (login required).

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**GUIDELINE:** Under no circumstances may the logo be altered, modified or hand-drawn, nor may it be typeset, reproduced or electronically scanned in such poor quality as to distort or significantly alter its appearance.

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**GUIDELINE:** You may not change the proportions of the logo. You may not make the logo unreasonably large or so small that it is illegible.

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**GUIDELINE:** When using the logo, you must maintain a reasonable “clear zone” around the logo so it is not crowded with other visual elements. Do not place copy over or too closely around the logo so as to clutter it. Do not enclose the logo in a design which confines it or gives it a different look. You may not place photographs, lines, markings, or artwork across or over any of the logo.

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**CFP Board's legal tagline is required when using the Certification Marks on the internet (e.g., websites and social media), and in any advertisements and other promotional materials.**

**FULL TAGLINE**

(only those marks being used need to be listed in the tagline):

“Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP® (with plaque design) in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.”

**SHORT TAGLINE**

(only authorized when the full tagline will not fit due to space restrictions; only those marks being used need to be listed in the tagline):

“CFP Board owns the marks CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP® (with plaque design) in the U.S.”

**CFP Board's Certification Marks must not be used as nouns.**

For example, "There are many CFP®s who are employed at the ABC firm...." and "He is a CFP®...." are both incorrect. Proper use would be, for example, "There are many CFP® practitioners at the ABC firm...." and "He is a CFP® certificant...."

**The Six CFP Board Approved Nouns:**

Professional, Practitioner, Certificant, Certification, Mark, Exam

**The CERTIFIED FINANCIAL PLANNER™ mark must be in all capital letters, or "Small Caps" ("CERTIFIED FINANCIAL PLANNER™").**

**The CFP® mark must be followed by a superscripted "®"; the CERTIFIED FINANCIAL PLANNER™ mark must be followed by a superscripted "™".**

**Those who have been authorized by CFP Board to use the Certification Marks, have earned a "Certification," not a "Designation."**

**The CFP® mark must not be used as a parenthetical abbreviation for the CERTIFIED FINANCIAL PLANNER™ mark.** Incorrect use, for example, would be, "Marc Smythe is a CERTIFIED FINANCIAL PLANNER™ (CFP®)."

**Certificants are strictly prohibited from using the Certification Marks in domain names/ URLs and email addresses used by them.**



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### **Q1: WHAT ARE THE CERTIFICATION WORD MARKS AND LOGOS AUTHORIZED FOR USE BY CFP® PROFESSIONALS?**

**A1:** CFP Board certification word marks approved for use by CFP® professionals include the CFP® mark, and the CERTIFIED FINANCIAL PLANNER™ mark. The CFP® (with plaque design) logo is approved for use by CFP® professionals, , variations of which can be accessed by logging in at [CFP.net/Marks](https://www.cfp.net/Marks).

### **Q2: WHAT IS THE PROPER WAY TO DISPLAY THE CFP BOARD CERTIFICATION MARKS?**

**A2:** The proper trademark symbol for each mark is required. The CFP® mark must be followed by a superscripted registration symbol, ®. The CERTIFIED FINANCIAL PLANNER™ mark must be followed by a superscripted trademark symbol, ™. Both marks must be in all capital letters, with the CERTIFIED FINANCIAL PLANNER™ mark having an option to be printed in small caps, CERTIFIED FINANCIAL PLANNER™.

### **Q3: HOW DO I MAKE THE ™ AND ® IN MY WORD DOCUMENT OR ON MY WEB PAGE?**

**A3:** In a Word document, typing (R), will usually convert to ®; and, typing “(TM)”, will usually convert to ™. For a website, copy and paste the symbol onto your website page. On a PC keyboard, the symbols can usually be created in this manner: ™= Ctrl+Alt+t; ® = Ctrl+Alt+r (to superscript the ® symbol, highlight the symbol and press Ctrl+Shift+“+”). HTML code for a Web page:  
™ = &#8482; ® = &#174.

### **Q4: WHAT SHOULD I DO IF MY WORD PROCESSING OR OTHER SOFTWARE PROGRAM IS UNABLE TO CREATE THE SUPERSCRIPED ® AND SUPERSCRIPED ™?**

**A4:** If possible, then the proper trademark symbol is required for each mark. However, if a CFP® professional is unable to create a trademark symbol or superscript in a particular medium, then type a capital R in parenthesis (R) in place of ®, and a “TM” in parentheses (TM) in place of ™.

*E.g., “Jane Doe is a CFP® professional” and “Jane Doe is a CFP(R) professional” are CORRECT.*

*E.g., “Jane Doe is a CERTIFIED FINANCIAL PLANNER™ professional” and “Jane Doe is a CERTIFIED FINANCIAL PLANNER(TM) professional” are CORRECT.*

### **Q5: MAY I USE THE CFP® or CERTIFIED FINANCIAL PLANNER™ CERTIFICATION MARKS AS NOUNS?**

**A5.** No. When used in a sentence, the CFP® and CERTIFIED FINANCIAL PLANNER™ marks always must be used as adjectives, never as nouns. Six nouns are approved for use after the Certification Marks: “professional,” “practitioner,” “certificant,” “certification,” “mark,” and “exam.”

*E.g., “Jane Doe is a CFP® professional” or “Jane Doe is a CERTIFIED FINANCIAL PLANNER™ practitioner” are CORRECT.*

*E.g., “Jane Doe is a CFP®” or “Jane Doe is a CERTIFIED FINANCIAL PLANNER™” are INCORRECT.*

### **Q6: MAY I CHOOSE WHICH CFP BOARD-APPROVED NOUN I WISH TO USE?**

**A6:** Yes. It is the individual CFP® professional’s prerogative to choose which approved noun to use, provided that the selection makes sense for the context and otherwise complies with CFP Board’s requirements.

## APPENDIX B: FREQUENTLY ASKED QUESTIONS (FAQs)

### **Q7: MAY I MODIFY OR RECREATE THE CERTIFICATION MARKS?**

**A7:** No. The certification marks always must be exactly as shown in this Guide and, with respect to the logo, as downloaded from CFP Board’s website at [CFP.net/Marks](https://www.cfp.net/Marks) (login required).

### **Q8: MAY I USE THE CERTIFICATION MARKS IN AN EMAIL ADDRESS, DOMAIN NAME, OR SOCIAL MEDIA HASHTAG?**

**A8:** No. CFP® professionals, as a condition of certification, are strictly prohibited from using the Certification Marks in email addresses, domain names, URL addresses or social media hashtags.

E.g., “JaneDoeCFP@gmail.com,” “janedoeCFP.com”, #jdoecertifiedfinancialplanner, @janedoeCFP are NOT permitted.

### **Q9: MAY I USE THE CERTIFICATION MARKS ON MY WEBSITE OR OTHER COMMUNICATIONS?**

**A9:** Yes, but only if associated directly with the individual CFP® professional’s name. The mark or logo may not be used, for example, on a company’s website page, unless the mark is adjacent to the name(s) of the individual CFP® professionals of the organization. The Certification Marks must be used in a manner which is clearly associated with the name of the individual CFP® professional, rather than a company or group of people.

### **Q10: WHAT IS THE DIFFERENCE BETWEEN THE ™ AND THE ®?**

**A10:** The ™ symbol stands for “trademark” and the ® symbol stands for “registered” trademark. Using the ™ symbol informs the public that CFP Board owns and uses the mark and will object to unauthorized or infringing use of the exact or confusingly similar marks in order to protect its rights. Using the ® has the same function, but also tells others that the mark is registered with the U.S. Patent and Trademark Office.

### **Q11: IS THERE A LEGAL LINE I NEED TO INCLUDE ON MATERIALS BEARING ANY OF THE CERTIFICATION MARKS?**

**A11:** Yes. CFP Board’s Certification Marks remain the property of CFP Board, and should be identified as such on all materials bearing any of the marks. All materials bearing any of the Certification Marks should include the following tagline. Note that only the marks in use need to be included in the tagline.

#### **Full tagline example:**

“Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP® (with plaque design) in the U.S., which it authorizes use of by individuals who successfully complete CFP Board’s initial and ongoing certification requirements.”

#### **Short tagline example (for limited space, articles, marketing materials, pamphlets, etc.)**

“CFP Board owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP® (with plaque design) in the U.S.”

**Q12: MAY I USE THE CERTIFICATION MARKS AFTER I HAVE COMPLETED THE EDUCATION REQUIREMENT FOR CERTIFICATION, EVEN IF I HAVE NOT COMPLETED THE REMAINING REQUIREMENTS (EXAM, EXPERIENCE, ETC.)?**

**A12.** No. Only those who have completed all of the requirements for CFP® certification and have been granted certification by CFP Board are authorized to use the marks. However, if you have fully completed your education requirement within the previous five years, you may refer to yourself as a “Candidate for CFP® certification” on your resume.

**Q13: MAY I INCLUDE A HYPERLINK TO CFP BOARD’S WEBSITE ON MY WEB PAGE?**

**A13:** Yes. However, any hyperlinks should direct the user completely out of your website and directly to CFP Board’s website. Framing is not permitted.

**Q14: MAY I USE A CFP BOARD CERTIFICATION MARK AS PART OF MY COMPANY NAME?**

**A14.** No. The Certification Marks are owned by CFP Board, and it is not permissible for CFP® professionals to incorporate the marks into their company name in any form or fashion.

**Q15: MAY I USE THE CERTIFICATION MARKS ON COLLATERAL ADVERTISING MATERIALS, SUCH AS T-SHIRTS, HATS, BRIEFCASES, AND OTHER PROMOTIONAL MERCHANDISE?**

**A15:** If you are planning to sell such promotional merchandise, No. If you are planning to simply give away such goods as promotional items, Yes, but only if you first obtain CFP Board’s prior written authorization to use the Certification Marks on such items, and then properly use the marks as outlined in this Guide.

**Q16: MAY I USE THE CERTIFICATION MARKS ON A VEHICLE LICENSE TAG?**

**A16:** No. CFP Board prohibits CFP® professionals from using the Certification Marks other than directly associated with the individual certificant’s name. The Certification Marks must not be used on vehicle license tags.

**Q17: MAY I USE THE CERTIFICATION MARKS IF I AM NOT CURRENTLY CERTIFIED?**

**A17:** No. Your certification must be current and in good standing in order to use the Certification Marks.

**Q18. MAY I USE THE CFP® MARK AS A PARENTHETICAL ABBREVIATION FOR THE CERTIFIED FINANCIAL PLANNER™ MARK, OR THE CERTIFIED FINANCIAL PLANNER™ MARK AS A PARENTHETICAL EXPANSION OF THE CFP® MARK?**

**A18.** No. The two are separate and distinct certification marks and must be displayed separately.

*E.g., “Jane Doe is a CERTIFIED FINANCIAL PLANNER™ (CFP®) professional.” is INCORRECT.*

*E.g., “John Doe is a CFP® (CERTIFIED FINANCIAL PLANNER™) professional.” Is INCORRECT.*

**Q19: MAY I USE OR APPLY FOR THE REGISTRATION OF A TRADEMARK IN THE U.S. PATENT AND TRADEMARK OFFICE THAT INCLUDES OR IS SIMILAR TO ANY OF THE CERTIFICATION MARKS?**

**A19:** No. Certificants are strictly prohibited from registering or applying to register any of the Certification Marks, or any marks incorporating or confusingly similar to any of the Certification Marks.

**Q20: WHY IS ENFORCEMENT OF THE CERTIFICATION MARKS SO IMPORTANT?**

**A20:** Misuse has the potential to weaken the marks. By enforcing its marks and ensuring proper use thereof, CFP Board is working to ensure that the Certification Marks continue to remain strong in the financial planning arena. If the marks no longer stand for the competent and ethical financial planning standards CFP Board has established, then CFP Board will be unable to assure the public that persons displaying the Certification Marks have met CFP Board's high standards.

**Q21: WHAT HAPPENS IF I DO NOT FOLLOW CFP BOARD'S GUIDE TO USE OF THE CERTIFICATION MARKS?**

**A21:** As a CFP® professional, you have agreed to adhere to the rules and regulations set by CFP Board, and following the Guide is a condition of being permitted to display the Certification Marks. If you fail to follow the Guide and misuse the Certification Marks in your own materials and/or websites, then this may result in the revocation of your certification.

**Q22: WHO SHOULD I CONTACT IF I HAVE ADDITIONAL QUESTIONS ABOUT CFP BOARD CERTIFICATION TRADEMARK USE?**

**A22:** You may contact CFP Board's trademark department with any questions, comments or concerns by emailing [trademark@cfpboard.org](mailto:trademark@cfpboard.org) or calling 800-487-1497. You may also present your trademark questions, as well as request that your materials be proofed, if you desire.



**CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.**

1425 K St NW #800 Washington, DC 20005  
800.487.1497 | f 202.379.2299 | [mail@cfpboard.org](mailto:mail@cfpboard.org) | [CFP.net](http://CFP.net)