

CFP Marks Usage Quick Guide

If you are a CFP professional who is an active member of the Financial Planning Association of Malaysia (FPAM) and have successfully completed the certification requirements, you are authorised to use three special marks:

CFP®

CERTIFIED FINANCIAL PLANNER™



CFP	CERTIFIED FINANCIAL PLANNER	CFP Logo	Legal Notice
®	TM	®	CFP®, CERTIFIED FINANCIAL PLANNER™ and  are certification marks owned outside the U.S. by Financial Planning Standards Board Ltd. Financial Planning Association of Malaysia is the marks licensing authority for the CFP marks in Malaysia, through agreement with FPSB.

Practical Usage of CFP Marks by Financial Planners

1. Business Cards

✓ DO:

- Use CFP® after your full name (e.g., Jack Lee, CFP®)
- Capitalise fully: CFP®

✗ DON'T:

- Write "Jack Lee, CFP"
- Use lowercase "cfp"

2. Letterhead

✓ DO:

- Include CFP® or CERTIFIED FINANCIAL PLANNERS™ mark on first use
- Use with approved nouns like "professional" or "practitioner" (e.g. CFP professional, CFP practitioner)
- Maintain consistent capitalisation

✗ DON'T:

- Alter the mark's appearance
- Use without trademark symbol

3. Professional Websites

✓ DO:

- Include CFP® or CERTIFIED FINANCIAL PLANNERS™ mark on first use
- Use with approved nouns like "professional" or "practitioner" (e.g. CFP professional, CFP practitioner)
- Maintain consistent capitalisation

✗ DON'T:

- Use CFP or CERTIFIED FINANCIAL PLANNERS in domain name
- Repeat CFP or CERTIFIED FINANCIAL PLANNERS in meta keywords
- Use CFP or CERTIFIED FINANCIAL PLANNERS as part of email addresses

4. Professional Signatures

✓ DO:

- Include CFP® after name (e.g., Jack Lee, CFP®)
- Capitalise fully

✗ DON'T:

- Use lowercase
- Modify the mark's appearance

5. Brochures & Promotional Materials

✓ DO:

- Include CFP® or CERTIFIED FINANCIAL PLANNERS™ mark on first use
- Use with approved nouns like "professional" or "practitioner" (e.g. CFP professional, CFP practitioner)
- Maintain consistent capitalisation
- Include trademark symbol
- Seek FPAM's approval for materials

✗ DON'T:

- Modify logo colours
- Reproduce low-quality artwork

6. Professional Credentials Display

✓ DO:

- Use CFP® after your full name (e.g., Jack Lee, CFP®)
- Capitalise fully: CFP®
- Use with approved nouns like "professional" or "practitioner" (e.g. CFP professional, CFP practitioner)
- Maintain proper capitalisation
- Include appropriate trademark symbol

✗ DON'T:

- Use in plural form (e.g. CFPs, CERTIFIED FINANCIAL PLANNERS™)
- Alter mark's visual integrity
- Use without proper symbol

7. Social Media Profiles

✓ DO:

- Use CFP® after name
- Capitalise fully
- Use as an adjective describing professional status and with approved nouns (e.g. CFP professional, CFP practitioner)

✗ DON'T:

- Modify mark's appearance
- Use without trademark symbol

Golden Rules

- Always use CFP® or CERTIFIED FINANCIAL PLANNERS™ as an **ADJECTIVE** (e.g. CFP professional, CFP practitioner)
- CAPITALISE fully
- Use ONLY with approved nouns (e.g. CFP professional, CFP practitioner)
- Include APPROPRIATE trademark symbol
- NEVER alter the mark's appearance



Approved Nouns

Approved nouns are specific words used to describe the people who have the CFP certification and the certification itself in a professional manner.

- Certificant
- Certification
- Credential
- Designation
- Exam/Examination

- Mark
- Practitioner
- Professional

The key is that these nouns must be used with the CFP marks in a specific, professional manner.

Examples of correct usage:

"I am a CFP professional"

"I earned the CFP certification"

Examples of incorrect usage:

"I am a CFP"

"I have CFPs"

Always Remember

The CFP marks are a mark of PROFESSIONAL EXCELLENCE. Use them with pride, precision and respect for the certification's standards.