



Financial Planning  
Institute of Southern Africa

**THE PROFESSIONAL STANDARD**

## QUICK MEDIA GUIDE

**Correct use of the CFP® mark in conversations, interviews and presentations.**

1. Always use the mark as an adjective - although it sounds strange to the casual user, the mark must never be used as a noun - a trademark must always be used as an adjective modifying a noun.



**I am a CFP professional  
We are all CFP practitioners**



**I am a CFP  
We consulted a CFP**

2. Only modify certain nouns with the CFP® mark - since the CFP® mark identifies an individual who has met the FPI's certification standards; the mark should modify nouns that refer to an individual, the certification programme or the mark itself. The FPI has eight approved nouns that can follow the mark in conversation: certificant; certification; credential; designation; exam/examination; mark; practitioner; professional



**I am a CFP professional  
We each hold the CFP designation  
I passed the CFP examination**



**We work in a CFP firm  
I am a CFP member  
I obtained the CFP qualification**

3. The mark may not be used as a plural or possessive word.



**Paul and Chris are CFP professionals**  
**We only employ CFP practitioners**



**James and Simon are CFPs**  
**The new CFPs will meet on Monday**

Let's Talk



"I am a CFP professional and a member of the FPI. I obtained my CFP designation in 2011 after I successfully completed the CFP exam. I am employed as a CFP practitioner at Top-Notch Financial Planners, a company who only employs CFP professionals. I am passionate about promoting and protecting the coveted CFP mark and hope other CFP practitioners are too."



"I am a CFP member of the FPI. I obtained my CFP qualification in 2011 and have since then been employed by CFPs-R-US, a company who only employs CFPs."

Additional Note:



As stated above the "CFP" acronym mark must be used as a descriptive adjective, not as a noun or a verb. This is to prevent the mark from becoming generic. An exception applies when the "CFP" acronym mark is used following an individual's name on screen (news ticker/running ribbon). In this case it would be acceptable to use the mark as follows:  
Mark Long, CFP®