



Financial Planning
Institute of Southern Africa

THE PROFESSIONAL STANDARD



Marks Use for FPI Recognised Education Providers

In accordance with the “**FPI Education Programme**” all brochures, website content, visual presentations, promotions, or any other visual media or electronic communication materials that reference any of FPI’s marks or refer to FPI’s certification process must be reviewed and approved by FPI prior to use.

If you would like FPI to review materials that you are developing which feature any of the FPI marks within this guide, please contact our legal and compliance department at standards@fpi.co.za.

1. The CFP® mark as well as the FSA™, AFP™ and RFP™ marks must be used according to the rules described in the FPI Use of Mark Guide available at www.fpi.co.za/trademarks.

2. FPI Recognised Education Providers that refer to the CFP® mark in programme titles may do so upon FPI’s approval and only if the following four requirements are met:

- a. The title is represented as one of the following or a pre-approved variant that has “**CFP® Certification**” or “**CERTIFIED FINANCIAL PLANNER® Certification**” as core words.

Correct Use:

- CFP® Certification Education Programme
 - CFP® Certification Professional Education Programme
 - CFP® Certification Financial Planning Education Programme
 - CERTIFIED FINANCIAL PLANNER® Certification Education Programme
 - CERTIFIED FINANCIAL PLANNER® Certification Professional Education Programme
 - CERTIFIED FINANCIAL PLANNER® Certification Financial Planning Education Programme
- b. The words “**certificate**” and “**diploma**” should never be used in the title along with the CFP® mark.
- c. The following disclaimer must appear on all educational certificates provided by an **FPI Approved Education Provider** and be clearly associated with the programme title (in a legible font size proportional to the text being used):
- This certificate indicates completion of the educational component of the FPI CFP® certification programme. To be authorised to use the CFP®, CERTIFIED FINANCIAL PLANNER® and  marks, individuals must complete additional examination, experience and ethics requirements.*
- d. CFP® mark may not be referenced to describe your education programme if the institution is not an FPI member in good standing. If FPI terminates a programme’s registered status, the programme must immediately cease use of the CFP® mark in programme titles or descriptions.

Correct Use:

This educational programme is registered with FPI. FPI is a certifying organisation whose mission is to benefit the public by fostering professional standards in personal financial planning.

3. The CFP® mark may not be used as part of, or incorporated in, the name of a course title, course number or code.

Correct Use:

- Ethics for Financial Planners
- FP101 Introduction to Financial Planning
- Postgraduate Diploma in Financial Planning

Incorrect Use:

- CFP® Ethics Course
- CFP101 Introduction to Financial Planning
- Postgraduate Diploma in Financial Planning (CFP®)

4. The CFP® mark may not be used to brand products or services owned and provided by an organisation. The marks may be referenced to describe an organisation's collaboration with or participation in FPI's certification process.

Correct Use:

Completion of ABC University's financial planning programme fulfils the educational component, one of the requirements of CFP® certification. ABC University offers continuing education programmes that help fulfil the requirement for CERTIFIED FINANCIAL PLANNER® professionals.

Incorrect Use:

ABC University offers a CFP® educational programme. ABC Company offers a CFP® review course. ABC Company offers CFP® continuing education programmes and hours.

5. The director or staff of an FPI Recognised Education Provider should not use the CFP® mark in their title.

Correct Use:

ABC University, FPI **Recognised** Education Provider

Jane Doe, Programme Director, [Official Name of Program, as registered with FPI] or Jane Doe, Program Contact for ABC University's Education Provider.

John Smith, CFP®, is on the faculty of our FPI Approved Education Provider.

Incorrect Use:

CFP® Program Director

Director of CFP® Program, ABC University CERTIFIED FINANCIAL PLANNER® Program Contact CFP® faculty

6. The CFP® mark should never be referred to as "titles" but rather as a certification (collectively) awarded by FPI.

Correct Use:

The educational component of the CFP® certification can be completed at ABC University. John Smith earned the right to use the CERTIFIED FINANCIAL PLANNER® mark three years ago.

Incorrect Use:

John Smith earned the right to use the CERTIFIED FINANCIAL PLANNER® title three years ago.

7. The CFP® mark should not be used to modify the name of a FPI publication.

Correct Use:

The FPI Code of Ethics and Practice Standards

Incorrect Use:

The CFP® Code of Ethics and Professional Responsibility

8. Individuals who have met some, but not all, initial certification requirements are not authorised to use the CFP® mark in conjunction with their names. Individuals may use the marks to refer to the CFP® certification process.

Correct Use:

John is in the process of completing a course of study that meets the educational component of the CFP® certification. John is working towards obtaining the CFP® certification.

In 2004, John completed the educational component of the CFP® certification process. John is a candidate for CFP® certification.

Incorrect Use:

John is a CFP® candidate.

John is a CERTIFIED FINANCIAL PLANNER® candidate.

John is a potential CFP® professional.

9. The CFP® mark may be used as hyperlinks on an education provider's website, provided they link directly to the FPI website, www.fpi.co.za.

10. Organisations or institutions affiliated with the CFP® certification process may not purchase or obtain priority placement on internet search engines with either the CFP® mark or CERTIFIED FINANCIAL PLANNER® mark.

Contact us

If you have any questions, please feel free to contact our legal department:

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