



QAFP™ MARKS USAGE GUIDE

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CONTENTS

- Introduction..... 2
- QAFP Marks..... 2
- Contact Us 2
- Download Logo Artwork 2
- How To Use the TM Symbol 3
- Rules for Using the QAFP Marks 4
 - Rule #1: Use the TM Symbol 4
 - Rule #2: Use Capitals and Small Caps 4
 - Rule #3: Always Use the Marks as Adjectives 5
 - Rule #4: Use a Registered Trademark Notice 5
 - Rule #5: Use the **QAFP** Logo in Accordance with These Guidelines 6
- Rule #6: Using the QAFP Marks in Electronic Media 8
 - Websites 8
 - Other Social / Electronic Media..... 8
- Additional Conditions for Using the QAFP Marks 9
- Contact Details 1

Introduction

FP Canada™ oversees the award of QAFP Certification in Financial Planning throughout Canada. FP Canada's purpose is to champion better financial wellness for all Canadians and our mandate is to lead the advancement of professional financial planning.

Congratulations on obtaining your QAFP certification. You have demonstrated the knowledge, skills, experience and ethics to provide holistic financial planning strategies and solutions for average Canadians with typical financial planning needs. QAFP professionals play an important role in helping their clients begin the journey to living life with confidence.

FP Canada ensures that the QAFP certification trademarks are protected and used properly throughout Canada and that any person using the QAFP certification trademarks has met appropriate certification requirements.

Please familiarize yourself with this guide before using the QAFP trademarks.

QAFP Marks

In accordance with these guidelines, QAFP professionals are authorized to use the following trademarks:

QAFP™

QUALIFIED ASSOCIATE FINANCIAL PLANNER™

The logo for QAFP, consisting of the letters 'QAFP' in a bold, blue, sans-serif font. A small 'TM' trademark symbol is located at the bottom right of the 'P'.

Contact Us

If you would like FP Canada to review materials that you are developing that feature any of the Marks within this guide, please contact our Marketing & Communications team at info@fpcanada.ca.

Download Logo Artwork

QAFP certificants can download the logo artwork by logging in to their FP Canada Portal at online.fpcanada.ca and clicking on "Marks Use Guide".

How To Use the TM Symbol

Inserting the TM Symbol

Access the TM symbol by holding down the “Alt” button on your keyboard while typing “0153” on the numerical keypad at the right of your keyboard.

In some programs you can also type Open Bracket, “TM” (in upper case) and Close Bracket.

The TM symbol will not automatically appear in superscript in all fonts, so you may need to superscript it manually.

Superscript in Different Fonts

Some fonts, including Calibri, Constantia, Lucida Sans and Consolas, automatically superscript the symbol on insertion. In these cases you don’t need to use the manual superscript:

correct use

QAFPTM Certificant—as automatically inserted in Calibri

incorrect use

QAFPTM Certificant—with additional superscript in Calibri (too small and too high)

In other fonts, including Times New Roman, Arial, Courier New, Franklin Gothic, Tahoma, Helvetica and Arial, the symbol is a full-size character. In these cases, you need to manually superscript the symbol:

correct use

QAFPTM Certificant—with additional superscript in Arial

incorrect use

QAFP TM Certificant—without additional superscript in Arial (too large and too low)

Rules for Using the QAFP Marks

Rule #1: Use the TM Symbol

Proper use of a mark and its symbol is important to preserve the distinctiveness of a brand and to prevent the loss of trademark rights. The first reference to QAFP in a document should contain the TM symbol. After that, you do not have to use the TM symbol, but you may choose to do so. Always use the proper symbol as indicated in this document, in superscript, at the upper right of the mark:

correct use:

QAFPTM professional

incorrect use:

QAFP professional TM

QAFP professional

Rule #2: Use Capitals and Small Caps

correct use:

QUALIFIED ASSOCIATE FINANCIAL PLANNERTM

QAFPTM professional

incorrect use:

Qualified Associate Financial PlannerTM

QafpTM professional

Rule #3: Always Use the Marks as Adjectives

Trademarks must never be used as nouns, but rather must always be used as an adjective modifying a noun. The Marks should only modify nouns that refer to individuals, the certification program, or the marks themselves. In the case of the QAFP mark, the approved nouns that may follow are: professional; certificant; practitioner; certification; credential; designation; exam/examination; mark.

correct use:

I am an QAFP™ certificant.

I have obtained the QAFP™ certification.

I achieved top marks in the QAFP™ exam.

incorrect use:

I am an QAFP™.

After I obtain QAFP™, I plan to go on to the CFP® examination.

Rule #4: Use a Registered Trademark Notice

To better protect the QAFP marks in light of Canadian trademark legislation, always use the following certification mark notice in materials that reference the QAFP marks:

- QAFP™, QUALIFIED ASSOCIATE FINANCIAL PLANNER™ and **QAFP** are certification marks of FP Canada. Used under license.

Where possible, this notice should be placed at the bottom of the page on which the corresponding mark (i.e. QAFP™ or **QAFP**) is referenced or, in the case of a multi-page document, at the bottom of the last page of the document.

In some instances, you may refer to QAFP marks in the same document as trademarks owned by other entities. Please use the appropriate notification for FP Canada's trademarks, as outlined here:

- QAFP™ and QUALIFIED ASSOCIATE FINANCIAL PLANNER™ are registered certification mark of FP Canada. Used under license.
- **QAFP** is a certification mark of FP Canada. Used under license.
- QAFP™, QUALIFIED ASSOCIATE FINANCIAL PLANNER™ and **QAFP** logo are certification marks of FP Canada. Used under license.

Rule #5: Use the QAFP™ Logo in Accordance with These Guidelines

QAFP certificants can sign in to their FP Canada Portal at online.fpcanada.ca to access the marks from the “Marks Use Guide” in the Quick Links menu.

QAFP certificants may use the QAFP logo in accordance with the guidelines below, when referring to their achievement of this certification and the services they offer.

The quality of logo cannot be altered in any manner. All reproductions must be made from original artwork, be readable, legible and on approved backgrounds, and have consistent use of colour.

Original Artwork

All reproductions of the logo must be made from original artwork provided by FP Canada. To obtain positive and reverse reproduction images from FP Canada, please contact our team at info@fpcanada.ca. Under no circumstances may the mark be altered, modified, hand drawn, typeset, reproduced or electronically scanned in poor quality as to distort or alter its appearance.

correct use:



incorrect use:

- Do not separate the graphic elements.
- Do not remove elements.
- Do not add elements.
- Do not re-proportion the elements.
- Do not reproduce the mark in unapproved colors.
- Do not reproduce the mark on complex backgrounds.

Legibility

The impact and legibility of the printed logo will be diminished if it is crowded with other visual elements. A clear zone surrounding the mark has been established as an area into which no other graphic imagery or other visual elements may enter. As shown below, this space is determined by the cap height of “QAFP” typographic element of the logo. The only exception to this rule is when the mark is used within text.



To ensure optimum legibility of the logo, a minimum reproduction size of 7 mm is recommended. If reduced to a smaller size, the overall legibility and visual impact of the mark may be compromised. If reproduction quality of the logo mark cannot be guaranteed when reproduced at 7 mm, a larger size may be necessary.

Approved Backgrounds

The positive mark should be used on light colored backgrounds ranging from white to values no darker than 30% of black. The logo should be reversed if used on dark backgrounds from 30% to 100% value of black.

Color Options

Consistent use of color in the mark is important to establish immediate recognition of individuals certified by FP Canada. The required color option for the mark uses PMS 280 C (HEX #012169) Blue for the “QAFP” element and the TM symbol.

The Logo Must Be Clearly Associated with the Individual Certified by FP Canada

correct use:

Simon Lim, QAFP

incorrect use:

Simon Lim Financial Services Corp. QAFP

Rule #6: Using the QAFP Marks in Electronic Media

Websites

Use the QAFP marks as described in this guide.

In the content of each individual website page, only the first use of each mark needs the registered trademark superscript symbol.

The QAFP marks should appear only once in the meta-text of the code within each website page belonging to an individual currently certified by FP Canada.

correct use:

```
<META name "keywords" content = "QAFP professional">
```

incorrect use:

```
<META name "keywords" content = "FP Canada QAFP Certificant, FP Canada QAFPPTM, QAFP Certificant">
```

The QAFP marks may be used as website hyperlinks only if they link directly to the FP Canada website (fpcanada.ca).

Domain Names

The QAFP marks may not be used as part of a domain name. They may appear as text or images throughout the website.

correct use:

www.simonlimfinancialplanning.com

incorrect use:

www.simonlimQAFPcertificant.com

Email Addresses

The QAFP marks may not be used as part of an email address.

correct use:

slim@hotmail.com

incorrect use:

Simon_Lim@QAFP4U.com

QAFPcertificant@simonlimfinancialplanning.com

Other Social / Electronic Media

The QAFP marks may not be used as part of a name or address in any social or electronic media, such as Twitter, LinkedIn and Facebook.

Additional Conditions for Using the QAFP Marks

QAFP professionals:

- acknowledge that FP Canada is the sole, absolute and exclusive owner of all right, title and interest in, and to, the QAFP Marks;
- will not challenge, directly or indirectly, FP Canada as the sole, absolute and exclusive owner of all right, title and interest in, and to, the QAFP marks, and the goodwill associated with these marks;
- will not challenge, directly or indirectly the validity, use and/or registration of the QAFP marks;
- will not adopt, use and/or register any mark or name that is or may be confusingly similar to the QAFP marks, as determined by FP Canada;
- will not, directly or indirectly, take, encourage or promote any action that would/does impair the rights of FP Canada in and to the QAFP marks or the goodwill associated with them, or use the QAFP marks in a way that would make it difficult for FP Canada to assert its ownership of the QAFP marks; and
- are subject to the conditions relating to the use of the QAFP marks as set forth in the QAFP certification policies.
- acknowledge that the QAFP marks:
 - must be used in a way that makes it clear that FP Canada owns them. Among other things, always use the notice described above when using a QAFP mark;
 - may not be used to imply FP Canada's endorsement of an individual or company (even when one or more employees are authorized by FP Canada to use the QAFP marks);
 - may not be used as part of the name of an individual's business or company; and
 - may not be altered by modifying in text form, animating, making three-dimensional, or using them on a patterned background, as a watermark, or as part of the background itself.




Contact Details

FP CANADA™

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416.593.8587 | 1.800.305.9886 | fpcanada.ca

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QAFP™

