



MARKS USAGE GUIDE FOR FP CANADA-APPROVED EDUCATION PROVIDERS

For FP Canada™ Marks, CERTIFIED FINANCIAL PLANNER® Marks,
and QUALIFIED ASSOCIATE FINANCIAL PLANNER™ Marks

October 2023



QAFP®

INTRODUCTION

Welcome to the FP Canada™ Marks Usage Guide, exclusively intended for use by FP Canada approved education providers.

This document will guide you through the proper usage of the FP Canada Marks, CFP® Marks, and QAFP® Marks. Correct usage by our education partners is essential to maintaining the integrity of our marks. Please read this guide in full to ensure you understand how to best use the marks to promote your approved education programs.

About FP Canada

Established in 1995, FP Canada™ is a national not for profit education, certification and professional oversight organization working in the public interest. FP Canada is dedicated to championing better financial wellness for all Canadians by leading the advancement of professional financial planning in Canada. There are about 17,500 CERTIFIED FINANCIAL PLANNER® professionals and about 1,600 QUALIFIED ASSOCIATE FINANCIAL PLANNER™ professionals (as at June 30, 2023), who are held to FP Canada’s rigorous professional and ethical standards. Visit the [FP Canada website](#) for more information.

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Marks Ownership

CFP Mark Ownership

The Financial Planning Standards Board (“FPSB Ltd.”) owns the CFP®, CERTIFIED FINANCIAL PLANNER® and certification mark and service marks (“CFP Marks”). FPSB oversees the development of international CFP certification standards to benefit consumers. FP Canada is the Canadian Affiliate of FPSB Ltd. and is solely authorized to administer the CFP Marks in Canada.

QAFP Mark Ownership

FP Canada owns the QAFP® mark and QUALIFIED ASSOCIATE FINANCIAL PLANNER™ mark (“QAFP Marks”) and oversees the award of QAFP certification throughout Canada. 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.

Importance of Using the Marks Correctly

The CFP certification, QAFP certification, and FP Canada marks must be used in compliance with trademark laws in each territory in which they are registered. If trademarks or certification marks are used improperly, they could eventually lose their protected status. If this were to happen to the CFP Marks or QAFP Marks, professionals would lose a differentiator that sets them apart. Likewise, consumers would be unable to rely on CFP certification and QAFP certification as marks of excellence for professional financial planning. To prevent this, all stakeholders are required to follow these guidelines for the use of the FP Canada Marks, CFP Marks, and QAFP Marks. In addition, each FPSB Affiliate is required to mandate proper use of its marks through a Code of Ethics and additional Standards of Professional Responsibility. **Please familiarize yourself with the contents of this guide before using the marks in Canada.**

Review and Approval Process

All the marks listed in this guide may only be used or published if they are compliant with these guidelines and upon prior written approval by FP Canada. FP Canada requires seven business days to review proposed content. Please do not publish any digital/print materials until you have received formal written approval from FP Canada.

Steps to follow to use the marks listed in this document:

Step 1: Review this guide thoroughly and familiarize yourself with our marks use policies.

Step 2: If you wish to use a logo/visual mark, send an email to educators@fpcanada.ca expressing interest and requesting access to the particular mark you would like to use.

Step 3: Use this guide to create an unpublished draft of the content containing the marks as you would like to use them.

Step 4: Share the unpublished content draft with FP Canada by sending an email to educators@fpcanada.ca.

FP Canada will review your use of the marks and respond within seven business days.

Step 5: FP Canada will send you formal written approval for your use of the marks.



HOW TO USE CFP MARKS

General Rules for Use of CFP Marks

1. The CFP mark and CERTIFIED FINANCIAL PLANNER mark should be referenced exclusively with the following approved nouns: certification, credential, designation, exam, mark, practitioner, and professional.
2. Individuals who have met some, but not all, of the initial certification requirements are not authorized to use the CFP Marks, or any variation of the marks.
3. The program director, chair, coordinator, or program lead of an education provider should **not** refer to themselves as “CFP Program Director,” “CFP Program Chair,” “CFP Program Coordinator,” “CFP Program Lead,” etc.
4. The CFP Marks may not be used as a part of an email address, domain name or other Internet address.
5. In accordance with FPSB’s “Criteria for Registering a Financial Planning Curriculum,” all printed and electronic materials that reference the CFP Marks or refer to the CFP certification process must be reviewed and approved by FP Canada prior to use.
6. When referencing the CFP Marks in printed or text materials, the education provider must always use the appropriate trademark ownership statement. The statement should appear in the portion of the materials where the marks are used and in as close proximity to the marks as reasonably possible. Where possible, use the following:

When using CFP Marks only:

CFP[®], CERTIFIED FINANCIAL PLANNER[®] and  are all trademarks owned by Financial Planning Standards Board Ltd. (FPSB) and used under license. FP Canada is the marks licensing authority for the CFP Marks in Canada, through agreement with FPSB. All other [®]/[™] are trademarks of FP Canada, unless indicated.

When using both, CFP Marks and QAFP Marks:

*CFP[®], CERTIFIED FINANCIAL PLANNER[®] and  are trademarks owned by Financial Planning Standards Board Ltd. (FPSB) and used under license. QAFP[®], QUALIFIED ASSOCIATE FINANCIAL PLANNER[™], **QAFP** and all other trademarks are those of FP Canada[™]. © 2023 FP Canada[™]. All rights reserved.*

7. Printed and electronic materials that refer to or discuss the CFP certification process must contain the following statement:
[Education provider] does not certify individuals to use the CFP, CERTIFIED FINANCIAL PLANNER and  marks. FPSB oversees the development of international CFP certification standards to benefit consumers. FP Canada is the Canadian Affiliate of FPSB Ltd. and is solely authorized to administer the CFP Marks in Canada.
8. When using the CFP Marks in electronic media, use the CFP 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 CFP Marks should appear only once (at the first instance) in the meta-text of the code within each website page.

Correct use

Incorrect use

<META name
“keywords”
content = “CFP
professional”>

<META name
“keywords”
content = “FP
Canada CFP
Certificant, FP
Canada CFPR, QAFP
Certificant”>

9. The CFP Marks may be used as website hyperlinks only if they link directly to the FP Canada website (fpcanada.ca).
10. Education providers may refer to the CFP Marks in program titles only upon FP Canada’s approval and only if the following four requirements are met:
 - a. The word “certificate” should never be used in the title along with the CFP Marks.
 - b. 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

Incorrect Use

- [Education Provider] Program Leading to CFP® Certification
- [Education Provider] Program Leading to CERTIFIED FINANCIAL PLANNER® Certification

- CFP Program
- CFP Certification Financial Planning Education Program
- CFP Certification Professional Education Program

11. The CFP Marks may not be referenced to describe an education program until the education provider has been approved or accredited by FP Canada. If FP Canada terminates an education provider’s approval or accreditation status, the education provider must immediately cease use of the CFP Marks in program titles and descriptions.
12. The following statement must appear on all educational certificates provided by an education provider and be clearly associated with the program title. It must appear in a legible font size proportional to the text being used.

This certificate indicates completion of the educational component of FP Canada’s CFP certification program. To be

authorized to use the CFP mark and CERTIFIED FINANCIAL PLANNER mark, individuals must complete additional exam, experience, and ethics requirements.

13. The CFP® mark, CERTIFIED FINANCIAL PLANNER® mark and  mark cannot be used to brand products or services owned by an education provider. The marks may be referenced to describe an education provider’s affiliation with or participation in FP Canada’s certification process.

Correct Use

Incorrect Use

Acme University offers Fundamentals programs, which meet FP Canada’s Technical Education – Fundamentals requirement towards CFP certification.

- Acme University’s CFP education program
- Acme University offers the CFP education program

The first reference to CFP certification in a document should be the fully expanded certification name in small capitals or capitals, with the Registered symbol –

“CERTIFIED FINANCIAL PLANNER® certification
 The second mention should use the registered symbol – “CFP® certification”
 After that, you do not have to use the ® 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.

15. Individuals who have met some, but not all, certification requirements are not authorized to use the CFP® mark,  mark, CERTIFIED FINANCIAL PLANNER® mark, or any variation of these marks. Organizations that offer programs affiliated with CFP® certification should not refer to students, or encourage students to refer to themselves, using such terms.

Correct Use

Incorrect Use

- Jane is working to obtain CFP® certification.
- Jane is a CFP® candidate.

16. 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.

Correct Use

- The program coordinator, John Smith, is a CFP® professional.
- Successful completion of Acme University’s program fulfills the Fundamentals and Advanced Program requirements for the CERTIFIED FINANCIAL PLANNER® certification.
- CERTIFIED FINANCIAL PLANNER® professionals will be attending the all-day seminar.

Incorrect Use

- The program director is a cfp professional.
- Successful completion of Acme University’s program fulfills the education requirements for the Certified Financial Planner certification

How to Position Your Education Programs That Lead to CFP Certification

As an education provider that offers FP Canada-approved courses, you can refer to FP Canada’s certifications when you describe your education programs. However, you must do so in a way that aligns with FP Canada’s pathways to certification and the specifications below.

Updating How We Refer to FP Canada’s Technical Education Courses

Formerly, technical education courses leading to CFP certification approved by FP Canada were referred to as “FP Canada-Approved Core Curriculum and Advanced Curriculum” courses and programs.

Since that time, the FP Canada Institute™ (*The Institute*) has developed its own technical education courses and programs. The Institute’s technical education programs are named “Technical Education – Fundamentals” and “Technical Education – Advanced.”

As such, changes have been made to the way we refer to technical education and technical education courses and programs offered by third party education providers.

How to Refer to Your Education Programs

To ensure that your students receive clear, consistent messaging about your FP Canada-approved courses and programs and their relationship to FP Canada’s pathways to certification, please adhere to the following rules when referring to your education program.

You **must not** use “Technical Education – Fundamentals” or “Technical Education – Advanced” to describe your courses or programs, including in your program titles.

You **may use** them to describe the relationship between FP Canada and your programs.

You **may use** “Fundamentals” as a descriptor within references to your education programs that formerly contained the term “Core Curriculum.”

You **may use** “Advanced” as a descriptor within references to your education programs that formerly contained the term “Advanced Curriculum.”

Please see the examples below:

Correct Use

- Acme University’s Fundamentals Program Leading to CFP® Certification
- Acme University’s Advanced Program Leading to CFP® Certification
- Acme University’s Fundamentals and Advanced Program Leading to CERTIFIED FINANCIAL PLANNER® Certification
- Acme University offers FP Canada-Approved Fundamentals courses, which meet FP Canada’s Technical Education – Fundamentals requirement towards CFP® certification

Incorrect Use

- Acme University’s Technical Education – Fundamentals Program
- Acme University’s Technical Education – Advanced Program
- Acme University’s Technical Education – Fundamentals and Advanced Program
- Acme University offers Technical Education – Fundamentals
- Acme University offers Technical Educational - Advanced

Sample Descriptions

Use these examples to craft a description for your FP Canada- approved education programs.

1. Courses within the Bachelor of Commerce program at Acme University meet FP Canada's Technical Education – Fundamentals and Technical Education – Advanced Requirements. Individuals who meet these requirements can sit for the CFP® exam and QAFP® exam. Our program coordinator, John Smith, is a CERTIFIED FINANCIAL PLANNER® professional, and our instructors provide you with the most current information in financial planning.
2. Individuals can attain CFP® certification after fulfilling FP Canada™- Technical Education – Fundamentals and Technical Education – Advanced requirements, and professional education requirements, in addition to exam, work experience, and ethics requirements. A CERTIFIED FINANCIAL PLANNER® professional has attained financial planning's most prominent certification.
3. CFP®, CERTIFIED FINANCIAL PLANNER® and  are trademarks owned outside the United States by Financial Planning Standards Board Ltd. FP Canada™ is the marks licensing authority for the CFP marks in Canada, through agreement with FPSB. All other trademarks are those of FP Canada, unless indicated. Acme University does not certify individuals to use the CFP Marks. CFP certification is granted only by FP Canada to those persons who, in addition to completing FP Canada's Technical Education – Fundamentals and Technical Education – Advanced requirements such as those offered by Acme University, have met professional education, ethics, experience and exam requirements.

Rules For Using the CFP Certification Logo Mark

About the Use of the CFP Certification Logo Mark

- In Canada, the logo mark comprises three components: the flame element, the letters “CFP” and the “®” symbol. These components must be used together as one unit at all times to protect the visual integrity of the mark.
- All reproductions of the logo mark must be made from original reproduction artwork provided by FP Canada, available upon request.
- Under no circumstances may the logo mark be altered, modified or, hand drawn, nor may it be typeset, reproduced or electronically scanned in poor quality so as to distort or significantly alter its appearance.



Do not use without the registered “®” mark.



Do not use without the flame.



Do not use the flame alone.



Do not separate the graphic elements.



Do not add other elements.



Do not re-proportion the elements.



Do not reproduce the mark in unapproved colors.



Do not reproduce the mark on complex backgrounds.



Do not use poor quality reproduction art.



Do not try to recreate the mark.



Do not skew or distort the mark.



Do not use the mark in outline form.

How to Use the Logo Mark

Crowding the logo mark with other visual elements will lessen its impact and legibility. To control the quality of the logo mark's appearance, all reproductions, whether print or digital, must be made from original artwork and be readable/legible, Colour must be used consistently (please see the following page).

Important: All acceptable versions of the logo mark are available as digital artwork on the [FP Canada website](#). They must never be altered or manually reproduced in any way.

Minimum Size

The smallest size at which the logo mark can be reproduced to ensure optimum legibility is 6 mm or 22 pixels. A larger size may be required if reproduction quality and/or legibility of the logo mark cannot be guaranteed when reproduced at the minimum size.



Clear Space

To help preserve the integrity of the logo mark, the clear space surrounding it must be respected. No other graphic imagery or other visual elements may enter this clear space. This space is determined by the cap height of "CFP," the typographic element of the logo mark. The one exception to this rule is when the mark is used within text.



To be used when the logo mark is greater than 36mm or 136 pixels.



To be used when the logo mark is between 12–36mm or 45–136 pixels.



To be used when the logo mark is between 7–12mm or 26–45pixels.



To be used when the logo mark is less than 7mm or 26 pixels. This size relationship is only to be used within text paragraphs, and should never appear smaller than 6mm or 22 pixels.

To control the quality of the logo mark's appearance, all reproductions, whether print or digital, must be made from original artwork and use colour consistently. They must also be readable/legible (please see the previous page). Consistent use of colour in the mark is important to establish immediate recognition of individuals certified by FP Canada.

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

Full-Colour Mark

Whenever possible, the logo mark should appear on a white background in its positive colour version, with the flame element in Pantone® 280 Blue and the "CFP" and ® symbol in black. However, the positive full-colour mark may be used on light-coloured backgrounds ranging from white to values no darker than 40% black. If the logo mark appears on dark backgrounds with a 50% value of black or more, use the reverse version. That is, the version that features light text and imagery on a darker background.

Full-Colour



One-Colour Positive Mark

Where production or printing limitations exist, a black and-white mark may be used. The positive version should appear in black and be used on a background ranging from white to no darker than 40% black. When placing the mark over a background with a 50% value of black or more, use the reverse version.

One-Colour Positive



Reverse Mark

The reverse version of the logo mark may appear on a simple, single-colour background. The reverse logo mark may be enclosed in a simple shape, but the background may not be stylized.

Reverse options



HOW TO USE QAFP MARKS

General Rules for the Use of QAFP Marks

1. The QAFP mark and QUALIFIED ASSOCIATE FINANCIAL PLANNER mark should be referenced exclusively with the following approved nouns: certification, credential, designation, exam, mark, practitioner and professional.
2. Individuals who have met some, but not all, of the initial certification requirements are not authorized to use the QAFP Marks, or any variation of the marks.
3. The program director, chair, coordinator or program lead of an education provider should not refer to themselves as “QAFP Program Director,” “QAFP Program Chair,” “QAFP Program Coordinator,” “QAFP Program Lead,” etc.
4. The QAFP Marks may not be used as a part of an e-mail address, domain name or other Internet address.

5. All printed and electronic materials that reference the QAFP Marks or refer to FP Canada’s certification process must be reviewed and approved by FP Canada prior to use.
6. When referencing the QAFP Marks in printed or text materials, the education provider must always use the appropriate trademark ownership statement. The statement should appear in that portion of the materials where the marks are used and in as close proximity to the marks as reasonably possible.

When using QAFP Marks only:

QAFP®, *QUALIFIED ASSOCIATE FINANCIAL PLANNER™*, **QAFP** and all other trademarks are those of FP Canada™. © 2023 FP Canada™. All rights reserved.

When using both, QAFP Marks and CFP Marks:

CFP®, *CERTIFIED FINANCIAL PLANNER®* and  are trademarks owned by Financial Planning Standards Board Ltd. (FPSB) and used under license. *QAFP®*, *QUALIFIED ASSOCIATE FINANCIAL PLANNER™*, **QAFP** and all other trademarks are those of FP Canada™.

© 2023 FP Canada™. All rights reserved.

7. Printed and electronic materials that refer to or discuss the QAFP certification process must contain the following statement:

*[Education provider] does not certify individuals to use the QAFP® mark, QUALIFIED ASSOCIATE FINANCIAL PLANNER™ mark, or **QAFP** mark. QAFP certification is granted solely by FP Canada™ to individuals who, in addition to completing an educational requirement such as that offered by [Education provider], have met ethics, experience, and exam requirements. QAFP®, QUALIFIED ASSOCIATE FINANCIAL PLANNER, QAFP logo and all other trademarks are those of FP Canada.*

8. Education providers may refer to the QAFP Marks in program titles only upon FP Canada’s approval and only if the following four requirements are met: The title is represented as one of the following (or a pre-approved variant) that has “QAFP certification” or “QUALIFIED ASSOCIATE FINANCIAL PLANNER™ certification” as core words:

Correct use

- [Education Provider] Program Leading to QAFP Certification
- [Education Provider] Program Leading to QUALIFIED ASSOCIATE FINANCIAL PLANNER Certification
- FP Canada-Approved Fundamentals courses, which meets FP Canada's Technical Education – Fundamentals requirement leading to QUALIFIED ASSOCIATE FINANCIAL PLANNER™ Certification

Incorrect use

- QAFP Program
- QAFP Certification
- Financial Planning Education Program
- QAFP Certification Professional Education Program

10. The word “certificate” should never be used in the title along with the QAFP Marks.

11. The following statement must appear on all educational certificates provided by an education provider and be clearly associated with the program title. It must appear in a legible font size proportional to the text being used.

This certificate indicates completion of certain educational components of FP Canada's QAFP® certification program. To be authorized to use the QAFP mark and QUALIFIED ASSOCIATE FINANCIAL PLANNER™ mark, individuals must complete additional exam, experience and ethics requirements.

12. The QAFP Marks may not be referenced to describe an education program until the education provider has been approved or accredited by FP Canada. If FP Canada terminates an education provider's approval or accreditation, the education provider must immediately cease use of the QAFP Marks in program titles and descriptions.

Rules for Using the QAFP Marks

Use the Registered 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 certification in a document should use the full expanded certification name in small capitals or capitals, followed by the ™ symbol – “QUALIFIED ASSOCIATE FINANCIAL PLANNER ™ certification. The second use must contain the Registered symbol – “QAFP® certification”. After that, you do not have to use the ® 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

- Acme University offers courses leading to QAFP® Certification.

Incorrect use

- Acme University’s QAFP education program
- ABC Financial Inc. offers QAFP™ CE credits

Use Capitals and Small Caps and Always Use the Marks as Adjectives

Trademarks must never be used as nouns. Instead, a trademark 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 certification, credential, designation, exam, mark, practitioner, and professional.

Correct use

- QUALIFIED ASSOCIATE FINANCIAL PLANNER™ professional
- John Smith is a QAFP® practitioner.
- ABC Financial Inc. Wealth Management course is available to QAFP professionals and qualifies for 20 FP Canada-approved CE credits.

Incorrect use

- Qualified Associate Financial Planner™
- Qafp® professional
- They are QAFPs.
- QAFP® course.
- ABC Financial Inc. Wealth Management course is available to QAFPs

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

How to Position Your Education Programs That Lead to QAFP Certification

As an education provider that offers FP Canada-approved courses, you can refer to FP Canada’s certifications when you describe your education programs. However, you must do so in a way that aligns with FP Canada’s pathways to certification and the specifications below.

Updating How We Refer to FP Canada’s Technical Education Courses

Formerly, technical education courses leading to QAFP certification approved by FP Canada were referred to as “FP Canada-Approved Core Curriculum” courses and programs.

Since that time, the FP Canada Institute has developed its own technical education courses and programs. The Institute’s technical education program leading to QAFP certification is named “Technical Education – Fundamentals.”

As such, changes have been made to the way we refer to technical education and technical education courses and programs offered by third party education providers.

How to Refer to Your Education Programs

Incorporating the Institute’s Updated Technical Education into References to Your Program

To ensure that your students receive clear, consistent messaging about your FP Canada-approved courses and programs and their relationship to FP Canada’s pathways to certification, please adhere to the following rules when referring to your education program.

You **must not** use “Technical Education – Fundamentals” to describe your courses or programs, including in your program titles.

You **may use** them to describe the relationship between FP Canada and your programs.

You **may use** “Fundamentals” as a descriptor within references to your education programs

that formerly contained the term “Core Curriculum.”

Please see the examples below:

Correct Use

- Acme University’s Fundamentals Program Leading to QAFP Certification
- Acme University offers FP Canada-Approved Fundamentals courses, which meets FP Canada’s Technical Education – Fundamentals requirement towards QAFP certification

Incorrect Use

- Acme University’s Technical Education - Fundamentals Program
- Acme University offers Technical Education – Fundamentals

Sample Descriptions

Use these examples to craft a description for your FP Canada-approved education program.

1. Courses within the Business, Advanced Diploma program, at Acme College, are approved by FP Canada. Our courses satisfy FP Canada's Technical Education – Fundamentals requirements, allowing an individual to sit for the QAFP® exam. Our program coordinator, John Smith, is a QUALIFIED ASSOCIATE FINANCIAL PLANNER™ professional, and our instructors provide you with the most current information in financial planning.
2. Individuals can attain QAFP® certification after fulfilling FP Canada™'s Technical Education – Fundamentals requirements and professional education requirements, in addition to exam, work experience, and ethics requirements.
3. QAFP, QUALIFIED ASSOCIATE FINANCIAL PLANNER and **QAFP** are trademarks owned by FP Canada™. Acme University does not certify individuals to use the QAFP or QUALIFIED ASSOCIATE FINANCIAL PLANNER marks. QAFP certification is granted only by FP Canada to those persons who, in addition to completing technical education such as that offered by Acme University, have met the professional education, ethics, experience and exam requirements.

Rules for Using the QAFP Certification Logo Mark

Registered Trademark Logo

When using the QAFP certification logo, always ensure that you are using the logo with the registered mark symbol (®), and not the TM symbol (™).

Correct Use



Incorrect Use



Original Artwork

All reproductions of the logo must be made from original artwork provided by FP Canada. Under no circumstances may the mark be altered, modified, hand drawn, typeset, reproduced or electronically scanned in poor quality so as to distort or alter its appearance.

Important: All acceptable versions of the logo mark are available as digital artwork on the [FP Canada website](#). They must never be altered or manually reproduced in any way.

For details, please contact educators@fpCanada.ca

Correct Use



Incorrect Use

Separating 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 is 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.

Colour Options

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

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.

Rules for 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 (at the first instance) in the meta-text of the code within each website page.

Correct use

- <META name “keywords” content = “QAFP professional”>

Incorrect use

- <META name “keywords” content = “FP Canada QAFP Certificant, FP Canada QAFP TM, QAFP Certificant”>

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

Email Addresses

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

Correct use

- slim@hotmail.com

Incorrect use

- Simon_Lim@QA FP4U.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, or Facebook.

Hashtags

The QAFP mark can be used without a trademark or registered mark on social media platforms. Examples include following:

- #QAFP

HOW TO USE FP CANADA MARKS

How to Use FP Canada Trademarks

1. Use of the FP Canada™ trademark may not be referenced to describe an education program, or an educator's affiliation with FP Canada until the education provider has been approved or accredited by FP Canada. If FP Canada terminates an education provider's approval or accreditation, the education provider must immediately cease use of all FP Canada marks.
2. All printed and electronic materials that reference FP Canada marks or refer to FP Canada's certification process must be reviewed and approved in writing by FP Canada prior to use.

Using the TM Symbol in Text

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 FP Canada in a document should contain the ™ symbol. After that, you do not have to use the ™ symbol, but you may choose to do so. Always use the proper symbol as indicated in this document, in superscript, at the upper right corner of the mark.

Correct Use

- FP Canada™

Incorrect Use

- FP CanadaTM
- FP Canada

Using the FP Canada Logo

1. When using the FP Canada logo, always ensure that you are using the logo with the registered symbol (®) and not the trademark symbol (™).

Correct Use



Incorrect Use



2. All printed and electronic materials that use the FP Canada logo must include the following disclaimer statement:

FP Canada™ and FP Canada® Advancing Professional financial Planning are trademarks exclusively owned by FP Canada. All rights are reserved.

Important: All acceptable versions of the FP Canada logos are available as digital artwork. They must never be altered or manually reproduced in any way.

For details, please contact educators@fpcanada.ca.

How to Use the FP Canada Logo Mark

Our logo is a combination of our symbol and wordmark. The symbol's outer circle shape represents the 360-degree view of a financial plan and the ongoing need to cultivate and nurture it. The hexagonal interior in the symbol is based on the six sides of financial planning - and how they come together to form a single solution.

The colour palette in our logo reinforces our contemporary brand: retaining our vibrant heritage orange in the wordmark, and building in blues through the symbol to represent credibility, the clarity we bring to financial planning, and to tie into the CFP Marks and QAFP Marks. Our logo is how our audiences identify us. The consistent treatment of our logo supports our brand and builds a strong and lasting impression.



Logo Colour Versions

Full-Colour Positive Logo

Whenever possible, use the positive full-colour version of the FP Canada logo on a white background.

Full-Colour Positive



One-Colour Logo

Where production or printing limitations exist, a one-colour logo may be used. The one-colour positive version should appear in black and be used on a white background. This is the preferred one-colour application.

One-Colour Positive



Placing the Logo Over Images

Our visual identity system has been designed so that the logo may always stand on its own. When placing the logo over top of an image, place a white-filled box underneath it to ensure the logo does not get lost. Avoid placing the logo and white block over the key parts of the image. Use this approach sparingly.



Clear Space and Minimum Size

Clear Space

The clear space surrounding our logo must be respected to help preserve the integrity of the brand. We keep a minimum clear space around our logo that is equal to the height of the “F” in our wordmark.



Minimum Size

This is the smallest size at which the logo can be reproduced to ensure its legibility and adherence to accessibility standards. The minimum reproduction size of the logo is based on a diameter of the symbol being no less than 3/8" (9 mm) or 27 pixels.

Note that this is the minimum size, not the recommended size.

Minimum Size



Incorrect Logo Usage

The FP Canada suite of logos is the foundation of our brand. Maintaining the integrity of our logos at all times is critical. Adhering to these guidelines will ensure a strong and cohesive brand for our organization. At right are **some** examples of how not to treat the logo.



Don't distort, rotate, or skew the logo.



Do not resize or reposition logo elements.



Do not change or recreate the wordmark.



Do not change the logo colours.



Do not outline or add special effects to the logo artwork.



Do not place the logo on a background that is visually complicated.

Glossary

“FP Canada–Approved Technical Education - Fundamentals and Technical Education – Advanced courses” refer to programs that FP Canada has reviewed and approved as meeting the Technical Education - Fundamentals and Technical Education – Advanced course requirements towards QAFP certification and/or CFP certification.

“FP Canada Accredited Professional Education” refers to courses which have been accredited by FP Canada that deliver CFP professional education, meeting the professional education requirements for QAFP certification and/or CFP certification.

“**candidate for QAFP certification**” is an individual who has registered with FP Canada for the QAFP Professional Education Program, and/or is registered to sit for the QAFP certification exam.

“**candidate for CFP certification**” is an individual who has registered with FP Canada for the CFP Professional Education Program, and/or is registered to sit for the CFP certification exam.

“**Education provider**” is an organization that offers an FP Canada–approved, multi-course

financial planning curriculum, completion of which fulfills an individual’s Technical Education - Fundamentals and Technical Education–Advanced course education requirement for QAFP certification or CFP certification.

“**CFP Marks**” are the three trademarks (CFP, CERTIFIED FINANCIAL PLANNER, and ) owned by FPSB Ltd. that are awarded to individuals who successfully complete FPSB Ltd.’s initial and ongoing certification requirements.

“**course title**” is the title of a single course offered as part of a financial planning program offered by an education provider.

“**printed and electronic materials**” includes, but is not limited to, brochures, catalogue announcements, marketing letters, advertisements, websites and program announcements sent via e-mail.

“**program title**” is the title of an education program that is approved by FP Canada.

“**QAFP Marks**” are the three trademarks (QAFP, QUALIFIED ASSOCIATE FINANCIAL PLANNER and ) owned by FP Canada that are awarded to individuals who successfully complete FP Canada’s initial and ongoing certification requirements.

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