



FP RETIRED™ MARKS USAGE GUIDE

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Introduction

FP Canada™ oversees the award of FP Retired Status throughout Canada.

A national professional body working in the public interest, FP Canada is dedicated to championing better financial wellness for all Canadians by certifying professional financial planners and leading the advancement of professional financial planning in Canada.

The FP Retired status preserves the recognition of the accomplishments of former QAFP professionals and CFP professionals who have retired. The FP Retired status allows individuals to stay connected to the profession and continue to receive relevant information from FP Canada, including volunteer opportunities.

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

Please familiarize yourself with this guide before using the FP Retired trademarks.

FP Retired Marks

In accordance with these guidelines, FP Retired status holders are authorized to use the following trademarks:

FP Retired™



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

FP Retired status holders can download the logo artwork by logging in to their FP Canada Portal at online.fpcanada.ca and clicking on “Marks Use Guide” in the “My Resources” menu.

How To Use the ™ Symbol

Inserting the ™ Symbol

The ™ symbol is available in Microsoft Word by clicking on the Insert Tab along the top menu and then selecting from the “Symbols” drop down menu.

You can also access the TM shortcut by typing TM in brackets.

Some fonts do not show the ™ symbol in superscript format. If the ™ symbol does not automatically appear in superscript, you will need to do it manually. Do not superscript the ™ symbol if the font displays it correctly.

correct use

FP Retired™ status holder (Calibri)

FP Retired™ status holder (Georgia)

incorrect use

FP Retired™ status holder (too small and too high)

FP Retired TM status holder (too large and too low)

Rules for Using the FP Retired Marks

Rule #1: Use the ™ Symbol

Proper use of a mark is important to preserve the distinctiveness of a brand and to prevent the loss of trademark rights. The first reference to FP Retired in a document should contain the ™ symbol directly beside the mark. 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:

FP Retired™ status holder

incorrect use:

FP Retired status holder ™ (must be used directly beside the mark)

Rule #2: Use Capitals for FP and at least the first letter of Retired

correct use:

FP RETIRED™

FP Retired™

FP Retired™ status holder

incorrect use:

fp retired™ status holder

Fp Retired™

Rule #3: Always Use Marks as Adjectives

Trademarks should never be used as nouns. They should always be used as adjectives modifying nouns. In the case of the FP Retired mark, approved nouns that may follow are status holder; credential; designation; status.

correct use:

I hold FP Retired™ status.

I have obtained FP Retired™ status.

incorrect use:

I am FP Retired™.

Rule #4: Use a Trademark Notice

In light of Canadian trademark legislation, it is a best practice to use the following notice in materials that reference the FP Retired marks:

- FP Retired™ and the FP Retired Logo are trademarks of FP Canada - Used under license.

Where possible, this notice should be placed at the bottom of the page on which the marks are referenced or, in the case of a multi-page document, at the bottom of the last page of the document.

Rule #5: Use the FP Retired Logo in Accordance with These Guidelines

FP Retired status holders can sign in to their FP Canada Portal at online.fpcanada.ca to access the marks from the “Marks Use Guide” in the “My Resources” menu.

FP status holders may use the FP Retired Logo in accordance with the guidelines below, when referring to their status.

The quality of logo cannot be altered in any manner. All reproductions must be made from original artwork, be readable, legible, 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:



please note:

- 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. 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 reversed variation should be used if placed 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 280C, PMS 300C, PMS 631C and PMS 173C.

Rule #6: Using the FP Retired Marks in Electronic Media

Websites

Use the FP Retired marks as described in this guide.

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

The FP Retired 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 = "FP Retired status holder">
```

incorrect use:

```
<META name "keywords" content = "FP Canada FP Retired, FP Canada FP Retired">
```

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

Domain Names

The FP Retired marks may not be used as part of a domain name.

acceptable:

www.simonlimretiredplanner.com

unacceptable:

www.simonlimFPRetired.com

Email Addresses

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

acceptable:

slim@hotmail.com

unacceptable:

Simon_Lim@FPRetired.com

FPRetired@simonlimretiredplanner.com

Other Social / Electronic Media

The FP Retired 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 FP Retired Marks

FP Retired status holders:

- may reference the fact that they were previously certified as a QAFP™ professional or a CFP® professional so long as the reference includes the certification period end date (i.e., applicable date range).
- acknowledge that FP Canada is the sole, absolute and exclusive owner of all right, title and interest in, and to, the FP Retired 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 FP Retired marks, and the goodwill associated with these marks;
- will not challenge, directly or indirectly the validity, use and/or registration of the FP Retired marks;
- will not adopt, use and/or register any mark or name that is or may be confusingly similar to the FP Retired 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 FP Retired marks or the goodwill associated with them, or use the FP Retired marks in a way that would make it difficult for FP Canada to assert its ownership of the FP Retired marks; and
- are subject to the conditions relating to the use of the FP Retired marks as set forth in the FP Canada policies.
- acknowledge that the FP Retired 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 an FP Retired 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 FP Retired 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™

902-375 University Avenue, Toronto, Ontario M5G 2J5

416.593.8587 | 1.800.305.9886 | fpcanada.ca

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