



QAFP[®] MARKS USAGE GUIDE

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Introduction

Welcome to FP Canada’s QAFP Marks Usage Guide.

Congratulations on obtaining your QUALIFIED ASSOCIATE FINANCIAL PLANNER™ designation. We encourage ample use of the QAFP Marks to showcase your certification.

In order to maintain the integrity of the QAFP designation, please read this guide in full to ensure a complete understanding of how to correctly use the QAFP Marks.

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.

QAFP Certification Marks

In accordance with these guidelines, QAFP professionals in good standing with FP Canada are authorized to use the following trademarks:

QAFP®

QUALIFIED ASSOCIATE FINANCIAL PLANNER™

The logo consists of the letters 'QAFP' in a bold, blue, sans-serif font. A small registered trademark symbol (®) is located at the bottom right of the letter 'P'.

Contact Us

If you would like FP Canada to review materials you are developing that feature any of the marks in this guide, contact our marketing and communications team at info@fpcanada.ca.

Downloading Logo Artwork

As a QAFP professional, you can download the QAFP logo artwork by logging in to your FP Canada portal at online.fpcanada.ca and clicking on “Marks Use Guide”.

How To Use the ™ and ® Symbols

Inserting the ™ and ® Symbols

Access the ™ 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 the open bracket sign, “TM” (upper case), and the close bracket sign. The ™ symbol will not automatically appear in superscript in all fonts, so you may need to superscript it manually.

Access the ® symbol by holding down the “Alt” button on your keyboard while typing “0174” on the numerical keypad at the right of your keyboard.

In some applications, you can hold down the “Ctrl” and “Alt” buttons and type the letter R or type the open bracket sign, “R,” and the close bracket sign. The ® 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

QAFP® professional (as automatically inserted in Calibri)

Incorrect Use

QAFP® professional (with additional superscript in Calibri, which is 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

QAFP® professional (with additional superscript in Arial)

Incorrect Use

QAFP® professional (without additional superscript in Arial, which is too large and too low)

Rules for Using the QAFP Marks

Rule #1: Use the ® Symbol for QAFP® and ™ Symbol for QUALIFIED ASSOCIATE FINANCIAL PLANNER™

Proper use of the QAFP mark and its symbol helps to preserve the distinctiveness of the QAFP brand. The first reference to QAFP in a document should contain the ® symbol. After that, you do not have to use the ® symbol, but you may choose to do so.

Similarly, the first reference to QUALIFIED ASSOCIATE FINANCIAL PLANNER should contain the ™ symbol. After that, you may choose to use the ™ symbol after each reference or not.

Always use the proper symbol as indicated in this document, in superscript, at the upper right of the mark:

Correct Use:

QAFP® professional

QUALIFIED ASSOCIATE FINANCIAL PLANNER™ professional

Incorrect Use:

QAFP professional ®

QAFP professional

Rule #2: Use Capitals and Small Caps

When you spell out QUALIFIED ASSOCIATE FINANCIAL PLANNER™, type in small caps. In a Word document, you can find the small caps option on the “Home” tab in the “Font” group. Click the “Small caps” box under “Effects.”

When using the abbreviation QAFP®, always type in capital letters.

Correct Use:

QUALIFIED ASSOCIATE FINANCIAL PLANNER™

QAFP® professional

Incorrect Use:

Qualified Associate Financial Planner™

Qafp® professional

Rule #3: Always Use the Marks as Adjectives

Trademarks must never be used as nouns. In each instance, the marks should be used as an adjective modifying a noun. They should also 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, and mark.

Correct Use:

I am a QAFP® practitioner.

I have obtained the QAFP® certification.

I achieved top marks on the QAFP® exam.

Incorrect Use:

I am a 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 accordance with 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 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 **QAFP** logo are certification marks of FP Canada. Used under license.

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

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

QAFP professionals may use the QAFP logo in accordance with the guidelines below when referring to their achievement and the services they offer.

The quality of the logo cannot be altered in any way. All reproductions must be created from the original artwork. They must be readable, legible, on approved backgrounds, and use colour consistently.

Original Artwork

All reproductions of the logo must be created from original artwork provided by FP Canada. To obtain a positive reproduction image (one that features dark text on a white background) or a reverse reproduction image (one that features light text on a darker background), 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 a way that distorts or alters 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 space 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 the “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 coloured 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% the darkness of black.

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.

Clear Associations

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, including on platforms such as Twitter, LinkedIn and Facebook.

Additional Conditions for Using the QAFP Marks

As a QAFP professional, you must adhere to the following conditions:

- 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 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
- be subject to the conditions relating to the use of the QAFP marks as set forth in the QAFP certification policies.
- Acknowledge the following with regard to the QAFP marks:
 - They 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;
 - they 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);
 - they may not be used as part of the name of an individual's business or company; and
 - they may not be altered by or modified in text form by animating, making them 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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QAFP®

