

Guidelines For Designation Trademark Use

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CAP®

Chartered Advisor in Philanthropy®

ChFC®

Chartered Financial Consultant®

CLF®

Chartered Leadership Fellow®

CLU[®]

Chartered Life Underwriter®

RICP®

Retirement Income Certified Professional®

ChSNC®

Chartered Special Needs Consultant®

FSCP[®]

Financial Services Certified Professional®

WMCP[®]

Wealth Management Certified Professional®

These marks may only be used according to the following guidelines.

Anyone using any of the above designation marks or phrases, must use the "®"(registered) or "™" symbol when applicable, every time the marks are used, in any context(i.e. business cards, stationery, name tags, websites, ads, printed material, etc.). Note: When spelling out Global Leadership & Management Professional, or Global Financial Services Professional, no trademark symbol is used.

Additionally, these symbol marks should be styled using superscript.

APPROPRIATE USES:

- Jane Smith, CAP®, will be a presenter at next month's meeting.
- Proposal provided by Jane Smith, Chartered Advisor in Philanthropy®

INAPPROPRIATE USES:

- X Laura Kline, RICP, will be a presenter at next month's meeting.
- Proposal provided by Jason Jones, RICP® (Retirement Income Certified Professional)

These designation marks may only be used by an advisor who has earned the credential.

The designations must be used in compliance with The American College's Professional Recertification Program and Code of Ethics. Only once notified by The College's Registrar may the designee use the mark(s).

INAPPROPRIATE USES:

X Christina Borden, CLF® Pending Miles Raymond, ChFC® student.

Once notified by The American College of Financial Services that the designation may be used, an advisor can use the appropriate mark in either an acronym form, or spelled-out, but only directly associated with the advisor's name, and always with the appropriate symbol. The spelled-out version may come directly before, or after the associated name, but the acronym may only be used directly after the name. The marks may not be used to mislead consumers, or suggest the advisors have earned credentials they have not earned.

APPROPRIATE USES:

- ✓ John Lawrence, WMCP®, is pleased to announce...
- Wealth Management Certified Professional® John Lawrence is pleased to announce...
- John Lawrence, Wealth Management Certified Professional®...

INAPPROPRIATE USES:

 Christina Baker and Associates, a CLU firm® CLU® Christina Baker

No designation mark owned by The American College of Financial Services may be used as part of a business name, or as part of a web URL.

INAPPROPRIATE USES:

Ben Tran, RICP®, and Associates, LLC

× www.bentranRICP.org

× www.RICPAdvise.com

The designation mark may never be used in a type font larger than the associated name of the designee.

APPROPRIATE USES:

INAPPROPRIATE USES:

▼ Tyrone Blake, ChFC®

X Tyrone Blake, ChFC®

When notified by The American College of Financial Services that designation use must cease because of disciplinary action or Professional Recertification Program non-compliance, all references to the designation in association with the designee's name must be removed immediately from references in all media.

For all uses except stationery and business cards, any reference to the marks owned by The American College of Financial Services shall include the following footnote in reasonable proximity to the first reference of the mark(s): The CLU® [or other applicable mark] is the property of The American College of Financial Services, which reserves sole rights to its use, and is used by permission."

For designees earning multiple credentials or designations, such marks may be used in any order the designee chooses as long as all other guidelines are followed.

