



THE  
**AMERICAN**  
**COLLEGE**  
OF FINANCIAL SERVICES®

# Guidelines For Designation Trademark Use

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# Guidelines for Designation Trademark Use

The following marks and terms are the sole property of The American College of Financial Services and are subject to all applicable state, federal and international trademark laws.

## CAP®

Chartered Advisor  
in Philanthropy®

## ChFC®

Chartered Financial  
Consultant®

## CLF®

Chartered Leadership  
Fellow®

## CLU®

Chartered Life  
Underwriter®

## RICP®

Retirement Income  
Certified Professional®

## TPCP®

Tax Planning  
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:

- 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:

- ✗ 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:

- ✓ Tyrone Blake, ChFC®

## INAPPROPRIATE USES:

- ✗ 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.

