

## **Financial Planning Association Member Logo Usage Guidelines**

### **Overview:**

In 2010, FPA introduced its Member Logo program so that individual, group and institutional members could promote their affiliation with the organization. We have also established simple usage guidelines to preserve the integrity of the FPA brand and graphic elements – and to ensure that the logos are used appropriately. We ask for your cooperation and adherence to these guidelines so that our logo remains a visual cornerstone of our organizational identity and is presented accurately at all times.

### **Who may use the FPA Member Logos**

- FPA members in good standing who meet all criteria indicated for their membership level in the “Key to FPA Member Logo Usage” guide (see pages 3-4) and who adhere to the guidelines contained in this outline.
- The FPA Member Logo may not be extended for use to any organizations, individuals, non-members, or other third-party entities. If external groups enter into a sponsorship or partnership agreement with FPA, those entities may be granted limited use rights. However, FPA National will provide the FPA Member Logo Usage Guidelines for these arrangements once they are agreed upon. All usage agreements will be approved in writing by FPA National staff.
- Current FPA Institutional Members may obtain their logo by e-mailing [amy.leck@FPAnet.org](mailto:amy.leck@FPAnet.org).

### **Where to use the FPA Member Logo**

- FPA’s Member Logo can be used electronically for use in practitioners’ Web sites, electronic newsletter, social networking profile and e-mail signature.
- FPA’s Member Logos can also be used in printed materials like business cards, promotional materials, and newsletters.

### **How to use the FPA Member Logo**

- All FPA Logos must be used as provided and cannot be altered in any way, without express written permission from FPA National.
- If used electronically (e.g., Web site, e-mail signature, social media profile) hyperlink the Logo to [www.FPAnet.org](http://www.FPAnet.org).
- All FPA Member Logos indicate a current year of membership. This year must not be removed from the logo.
  - You must not use a past year version of the logo. For example, you should not display a FPA Member 2010 Logo in 2011.
- The Logo may not be used to denote or imply any direct endorsement by FPA of a member’s product or services.

- Do not use the Logo or the names Financial Planning Association or FPA more prominently than your personal name, company, product, or Web site name.
- Do not conjoin the FPA Member Logo with any other graphic or text in such a way as to imply FPA endorsement or sponsorship.
- For full Graphic Usage Guidelines for the FPA Member Logo, please see Page 5.

**Please do not use the FPA Member Logo if:**

- You are no longer an FPA member or have not renewed your membership.
  - If you are not an FPA member, you must immediately remove the Logo accordingly.
  - Use of this Logo when you are not a FPA member is strictly prohibited.
- It is being used on any Web site that is in violation of applicable laws or governmental regulations.

**Alterations to Logo Usage Guidelines**

FPA reserves the right to change the Logo and these Usage Guidelines at any time and solely at its discretion. If possible, FPA will provide advance notice of these changes. For the latest guidelines and information go to the Logo Program site located at [www.FPAnet.org/Membership/MemberLogo/](http://www.FPAnet.org/Membership/MemberLogo/).

**Cancellation of Authorization of Logo Usage**

FPA reserves the right to review use of the Logo. Disregard for these Usage Guidelines may result in a revocation of the right to use the Logo.

**Compliance and Enforcement**

- The Financial Planning Association is the owner of trademark [and registration], service mark and collective membership mark rights in and various U.S. registrations/applications for: FPA, FPA/Logo and FINANCIAL PLANNING ASSOCIATION.
- By using the FPA Member Logo, you indicate your agreement to abide by all the noted guidelines and to discontinue use of the logo should you not meet the eligible criteria.
- FPA reserves the right to disallow any use of the Logo.
- Any member found to be improperly using the Logo or using an unapproved version of the Logo must correct any discrepancies in their use of the Logo upon receipt of notice from FPA National.
  - Failure to immediately correct any issues may result in revocation of the right to use the FPA Member Logo.
- If you no longer meet the criteria to use the FPA Member Logo (e.g., are no longer a current member of FPA, or are no longer in good standing), you must voluntarily and immediately remove the Logo from all current applications within your oversight.
  - Failure to do so will result in electronic notification by FPA National to remove the Logo from your Web site and related usage/locations within 10 days of notice.
  - Failure to comply by the request will result in alternative contact (written and/or telephone) by FPA National to cease improper and unauthorized use of the Logo as a non-member.
  - Continued dismissal of FPA notifications regarding improper and unauthorized use of the Logo may result in legal action.

**QUESTIONS:** Please contact FPA's PR & Communications Department at [pr@FPAnet.org](mailto:pr@FPAnet.org).

**Key to FPA Member Logo usage**

<b>Member Type</b>	<b>Category</b>	<b>Requirements</b>	<b>Logo to Use</b>
<b>Individual Member</b>			
	Financial Planner	<ul style="list-style-type: none"> <li>• Current FPA member in good standing</li> <li>• Abides by FPA Code of Ethics and Standard of Care</li> </ul>	FPA Member Logo
	Candidate for CFP® Certification	<ul style="list-style-type: none"> <li>• Current FPA member in good standing</li> <li>• Abides by FPA Code of Ethics and Standard of Care</li> </ul>	FPA Member Logo
	1 <sup>st</sup> -Year CFP® Certificant	<ul style="list-style-type: none"> <li>• Current FPA member in good standing</li> <li>• Abides by FPA Code of Ethics and Standard of Care</li> </ul>	FPA Member Logo
	2nd-Year CFP® Certificant	<ul style="list-style-type: none"> <li>• Current FPA member in good standing</li> <li>• Abides by FPA Code of Ethics and Standard of Care</li> </ul>	FPA Member Logo
	Retired Financial Planner	<ul style="list-style-type: none"> <li>• Current FPA member in good standing</li> <li>• Abides by FPA Code of Ethics and Standard of Care</li> </ul>	FPA Member Logo
	Associated Professional	<ul style="list-style-type: none"> <li>• Current FPA member in good standing</li> <li>• Abides by FPA Code of Ethics and Standard of Care</li> </ul>	FPA Member Logo
	Support Staff	<ul style="list-style-type: none"> <li>• Current FPA member in good standing</li> <li>• Abides by FPA Code of Ethics and Standard of Care</li> </ul>	FPA Member Logo
	Educator	<ul style="list-style-type: none"> <li>• Current FPA member in good standing</li> <li>• Abides by FPA Code of Ethics and Standard of Care</li> </ul>	FPA Member Logo

	Educator with CE Package	<ul style="list-style-type: none"> <li>• Current FPA member in good standing</li> <li>• Abides by FPA Code of Ethics and Standard of Care</li> </ul>	FPA Member Logo
	Student – Degree	<ul style="list-style-type: none"> <li>• Current FPA member in good standing</li> <li>• Abides by FPA Code of Ethics and Standard of Care</li> </ul>	FPA Member Logo
	Student - Certificate	<ul style="list-style-type: none"> <li>• Current FPA member in good standing</li> <li>• Abides by FPA Code of Ethics and Standard of Care</li> </ul>	FPA Member Logo
	International Member	<ul style="list-style-type: none"> <li>• Current FPA member in good standing</li> <li>• Abides by FPA Code of Ethics and Standard of Care</li> </ul>	FPA Member Logo
<b>Institutional Member</b>			
	Institutional Member	<ul style="list-style-type: none"> <li>• Institutional Member company's membership must be current and in good standing</li> </ul>	FPA Institutional Member Logo
	Institutional Member Employee	<ul style="list-style-type: none"> <li>• Must be current designee by Institutional Member company for FPA Individual membership</li> <li>• Institutional Member company's membership must be current</li> <li>• Abides by FPA Code of Ethics and Standard of Care</li> </ul>	FPA Member Logo

## **FPA Member Logo** **Graphic Usage**

- When positioning the Logo side-by-side with another logo, the Logo should be placed to the right of the logo with which it has the closest relationship.
- Multiple logos must be approximately the same size unless one logo is used as the key design element, or is your company's logo.
- Don't print the Logo over other patterns, such as background lines, geometric patterns, or other distracting elements.
- Make sure that the Logo is never tilted or askew. Do not place the Logo upside down, backwards, or any other positioning outside of the original Logo orientation.
- Do not create dropshadows on the Logo, use the Logo in outline form, change the transparency of the Logo, or alter the color of the Logo in any way.
- Please ensure that nothing is placed over the Logo, and that the Logo does not overlap anything else.
- Do not place the Logo over a textured background or photo. Re-crop the image so that the Logo may be placed over a flat area with correct clear space.
- Do not use unauthorized icons or words in conjunction with the Logo.
- Do not change text in the Logo to a different font or color.
- Do not change the Logo color.
- Do not reverse the colors of the Logo.
- Only use the current Logo -- retired logos are not permissible.
- Any reduction or increase in size of the Logo must be proportional. Do not stretch or squeeze the Logo.
  - For web display, you may decrease the web size (130 x 56 pixels) by a maximum of 15% or increase it by a maximum of 50% as long as proportion is maintained. You may not animate, morph or in any other way distort the appearance of the Logo.
- Please ensure that there is a clear neutral space around the Logo so that it contrasts well with its surroundings.
- Do not remove any trademark symbols or alter the Logo in any way. Redraws, distortions, or animation of the Logo are not permitted.