

CFP® Mark Usage Summary Guide - Ireland

FPSB Ltd. owns the CFP®, CERTIFIED FINANCIAL PLANNER™ and  certification marks. CFP® professionals are authorized to use these marks. They identify that you have met rigorous ethics, competency and professional practice standards to deliver financial planning.

The marks must always be used in compliance with trademark law. If used improperly, they could eventually lose their protected status and consumers would be unable to rely on the CFP® certification as a symbol of quality for professional personal financial planning.

You can click [here](#) to view the full, detailed Trademark Usage Guide. The main points to note for Irish CFP® professionals are summarised as follows:

- **Always use CAPITAL letters and the appropriate symbols with the marks:**
 - CFP® (capital letters, no full stops, ® symbol directly after the letters)
 - CERTIFIED FINANCIAL PLANNER™ (all CAPITAL LETTERS, ™ symbol directly after the letters)
 - **Note:** If you have a text document/presentation/individual website page that mentions the CFP® or CERTIFIED FINANCIAL PLANNER™ marks *numerous* times, it is acceptable to only include the ® / ™ symbols in the **first** mention, and therefore omit them in any subsequent mentions within the **same** document/page
- When used **directly after a person's name** (e.g. email signature, business card, LinkedIn header) it is acceptable to use 'CFP®' and 'CERTIFIED FINANCIAL PLANNER™' on their own.
- However, in all other instances, CFP® and CERTIFIED FINANCIAL PLANNER™ **must be followed by one of 8 approved nouns** (whichever noun is most appropriate in the context). It is not appropriate for CFP® or CERTIFIED FINANCIAL PLANNER™ to be directly followed by any other word, except for one of these 8 words:
 - CFP® / CERTIFIED FINANCIAL PLANNER™ certificant/certificants
 - CFP® / CERTIFIED FINANCIAL PLANNER™ certification
 - CFP® / CERTIFIED FINANCIAL PLANNER™ credential
 - CFP® / CERTIFIED FINANCIAL PLANNER™ designation
 - CFP® / CERTIFIED FINANCIAL PLANNER™ exam/examination
 - CFP® / CERTIFIED FINANCIAL PLANNER™ mark/marks
 - CFP® / CERTIFIED FINANCIAL PLANNER™ practitioner/practitioners
 - CFP® / CERTIFIED FINANCIAL PLANNER™ professional/professionals
- **The CFP® mark must not be used as a parenthetical abbreviation** for the words CERTIFIED FINANCIAL PLANNER™, i.e. It is not appropriate to put the letters CFP® directly before/after/in brackets after the words CERTIFIED FINANCIAL PLANNER™. Instead, you should use one or the other, or put the word 'or' between them.

Below are some examples illustrating the most common uses of the marks:

Email Signature/Business Card/LinkedIn Header

| Incorrect Use | Why is this incorrect? | Correct Use |
|--|---|--|
| John Murphy QFA C.F.P.™ | <ul style="list-style-type: none"> • Full stops between the letters • Used ™ instead of ® | John Murphy QFA CFP® |
| John Murphy Certified Financial Planner | <ul style="list-style-type: none"> • Capital letters not used • Missing the ™ symbol | John Murphy CERTIFIED FINANCIAL PLANNER™ |

About Me / Bio (LinkedIn, website, CV, etc)

| Incorrect Use | Why is this incorrect? | Correct Use |
|---|--|---|
| I am a Certified Financial Planner™. | <ul style="list-style-type: none"> • Capital letters not used • Not followed by one of the 8 approved nouns | I am a CERTIFIED FINANCIAL PLANNER™ professional. |
| John is a CFP professional. | <ul style="list-style-type: none"> • Missing the ® symbol | John is a CFP® professional. |
| In 2022, I achieved the CERTIFIED FINANCIAL PLANNER™ qualification. | <ul style="list-style-type: none"> • ‘Qualification’ is not one of the 8 approved nouns | In 2022, I achieved the CERTIFIED FINANCIAL PLANNER™ certification. |
| John Smith is a CERTIFIED FINANCIAL PLANNER™ (CFP®) practitioner. | <ul style="list-style-type: none"> • CFP® must not be used as a parenthetical abbreviation for the words CERTIFIED FINANCIAL PLANNER™ | John Smith is a CERTIFIED FINANCIAL PLANNER™ or CFP® practitioner. |

LinkedIn

In addition to the ‘Header’ and ‘About’ section on your LinkedIn profile, there are a couple of other places where you might decide to mention your CFP® certification. Below are the most common ones, and the correct way to record it (inserting whatever ‘year’ is relevant to you):

Education



Financial Planning Standards Board Ireland
CERTIFIED FINANCIAL PLANNER™ certification
2022

Licenses & certifications



CERTIFIED FINANCIAL PLANNER™ certification
Financial Planning Standards Board Ireland DAC
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