

# ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> or APMA<sup>SM</sup>

## Rules and Guidelines on the Correct Use of the Marks

ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> and APMA<sup>SM</sup> are service marks owned by the College for Financial Planning and may be used as service marks only by the College. The College for Financial Planning may also use the marks to denote professionals who have successfully completed the APMA<sup>SM</sup> course work and met all other designation requirements. The ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> and APMA<sup>SM</sup> marks may be used only by persons who have received written authorization from the College for Financial Planning to use them. Because the public and professional communities are encouraged to rely on the qualifications of individuals authorized to use these marks, the College is aggressive in enforcement of the correct usage of the designation and the rights and responsibilities of those authorized to use the marks.

### These marks may not be used in any of the following ways:

- ◆ As part of the name of a firm or firm logo. This also applies where one or more firm members are authorized to use the marks in association with their own names.
- ◆ As the name of an investment product or plan.
- ◆ As generic terms. This occurs when a mark is used to describe a product or service.

Examples of generic uses are:

- “Xerox” instead of “Xerox” copies”
- “Kleenex” instead of “Kleenex” tissues”
- “ACCREDITED PORTFOLIO MANAGEMENT ADVISOR” instead of “ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> designee”

The College’s policing efforts prevent misuse, misappropriation, and misrepresentation of the

ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> and APMA<sup>SM</sup> marks to preserve their reputation and protect the public and designees alike. To protect the marks, notify the College promptly of any infringements or improper use so that appropriate action can be taken.

The following examples show correct and incorrect use of the ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> and APMA<sup>SM</sup> marks.

- ◆ The terms ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> and APMA<sup>SM</sup> must be used as adjectives, not as nouns, and they must never be used generically.

#### Correct:

They are APMA<sup>SM</sup> students.

He is an ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> designee.

#### Incorrect:

They are studying to become APMAs.

She is an Accredited Portfolio Management Advisor.

- ◆ Always capitalize the APMA<sup>SM</sup> mark. Do not put periods between the letters.

#### Correct:

John Jones, APMA

#### Incorrect:

John Jones, apma

Mary Smith, A.P.M.A.

- ◆ When possible, the ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> mark should appear in capital letters; otherwise, the first letter of each word must be capitalized.

#### Correct:

John Jones, ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup>

Mary Smith, Accredited Portfolio Management Advisor<sup>SM</sup>

#### Incorrect:

Mary Smith, accredited portfolio management advisor

- ◆ Do not change the form of the marks to create a new word or phrase.

#### Correct:

Mary Smith, ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup>

John Jones, APMA<sup>SM</sup>

The College’s ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> Program is available to investment professionals.

#### Incorrect:

John Jones, an APMA

ACCREDITED PORTFOLIO MANAGEMENT ADVISOR programs are available to investment professionals.

- ◆ The ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> and APMA<sup>SM</sup> marks should not be incorporated into the name of a firm.

#### Correct:

John Jones, ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup>

#### Incorrect:

Mary Smith, Inc., APMA<sup>SM</sup>

John Jones, Accredited Portfolio Management, Inc.

- ◆ Specify that the marks belong to the College for Financial Planning with a tagline or footnote at the end of an article, or at the bottom of the first page of an advertisement or the inside cover of a brochure.

Use this wording:

ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> and APMA<sup>SM</sup> are service marks of the College for Financial Planning®

## Guidelines for Logo Use

At the bottom of this page is the ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> logo for your use on all forms of printed materials, such as business cards, stationery, directory listings, press releases, and advertisements. This logo may not be altered or incorporated into other logo designs. The APMA<sup>SM</sup> logo may be used only if reproduced in its entirety.

Correct

Incorrect



## Instructions for Logo Reproduction

Take this flyer to your printer or graphic artist who will be preparing your new printed materials. They can easily reduce or enlarge the size of the logo below to create the best design for your materials, and to make the piece visually appealing. Ask for their advice in designing your materials so this credential is prominently displayed.



## Description of Service Mark

“A service mark is a word, phrase, symbol or design, or a combination of words, phrases, symbols or designs, that identifies and distinguishes the source of the service of one party from those of others.” (From Facts About Trademarks, U.S. Department of Commerce, Patent and Trademark Office).

The ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> and APMA<sup>SM</sup> marks are fast becoming highly respected credentials in the financial services industry. When you complete the educational and examination requirements of the College for Financial Planning<sup>®</sup>, and agree to adhere to the College’s standards of professional conduct and self-disclosure requirements, you are permitted to use these marks in printed and electronic forms of communication. Having worked hard to obtain the privilege to use these prestigious marks, you will want to protect them and use them wisely. The ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> and APMA<sup>SM</sup> marks should be used consistently and correctly to preserve their integrity and distinctiveness. As the owner of these marks, the College has the legal responsibility to ensure that they are protected and used only by persons who have received written authorization from the College for Financial Planning to use them. The College reserves the authority both to grant and revoke the privilege of using these marks.

The proper use of the ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> and APMA<sup>SM</sup> marks is explained in this flyer. Refer to the “Rules and Guidelines on the Correct Use of the Marks” section before preparing business cards, stationery, directory listings, press releases, advertisements, and other forms of printed and electronic communication. Remember, you will be an integral part of making the ACCREDITED PORTFOLIO MANAGEMENT ADVISOR<sup>SM</sup> and APMA<sup>SM</sup> credentials meaningful to the financial services profession and to the public



## Guidelines on the Correct Use of the Marks



College for  
Financial Planning<sup>®</sup>  
EDUCATING THE NATION'S TOP FINANCIAL ADVISORS<sup>SM</sup>