

BRANDING GUIDELINES

A. Branding

Providers have the right to use the APP Program's identifying logo on all printed and electronic marketing literature.

Providers may also make a limited use of the CFA Institute, CFA®, Chartered Financial Analyst®, CIPM®, and Investment Foundations™ trademarks ("Marks") to fairly describe their products and services. Design logos, including the CFA Institute design logo and CFA certification mark, may **not** be used.

Note:

- Provider products should be advertised as a supplement or complement to the study of the assigned CFA Institute program curriculum.
- Providers may not advertise products/services that are *not* preparatory courses for the CFA Institute programs when marketing to CFA Institute program candidates through a candidate mailing list provided by CFA Institute.

B. Use of Marks

1. Providers may make a limited use of the Approved Prep Provider logo, adhering to the usage guidelines found in the Prep Provider Resource Center.
2. Each provider must prominently include its own trade name, trademark, or service mark on its promotional materials that use the Marks. The Marks must be used to describe products and services offered by CFA Institute, not those of the provider.
3. Providers may not use the Marks in a manner that, in the opinion of CFA Institute, tends to mislead, misinform, deceive, disparage, or be distasteful in content or presentation. CFA Institute, in its sole discretion, may require providers to modify or amend such uses.
4. Providers must use the trademark registration symbol—®—after the first use and most prominent use (i.e., when a licensed mark is displayed in a larger font or used as a section heading) of the Marks on each page of providers' materials.
5. On websites, each page or section is considered a first and prominent use.
6. The following trademark disclaimer must appear in bold and at least size 8 font on all materials provider materials in which the Marks are used, including its website(s). :

CFA Institute does not endorse, promote, or warrant the accuracy or quality of the products or services offered by (*Insert Provider Name*). [Insert Marks used] are trademarks owned by CFA Institute.

7. The Marks must be used as adjectives, not as nouns.
8. , The Marks must not be used in the plural or possessive.
9. To refer to "a Chartered Financial Analyst" or a group of "CFAs" is improper. Proper use would be to refer to "CFA Charterholders" or "the Chartered Financial Analyst designation."
10. Providers shall not use any CFA Institute Marks or any trade dress of CFA Institute in

any manner that CFA Institute believes is likely to cause confusion as to the source of the materials or a provider's affiliation with CFA Institute.

11. Providers understand and agree that all goods and services they offer bearing the Marks shall be of good quality and that any goodwill arising from providers' use of the Marks shall belong to CFA Institute.
12. Should a provider's participation in the APP Program be terminated by either party, the provider shall immediately discontinue its use of the logo in all mediums.

C. Naming Guidelines for Review Courses

Providers may make fair use of the Marks in their review course titles. However, a provider must not use the Marks in its business name, trade name, product or service name, trademark, domain name, email address, or telephone number. Use should be limited to descriptions of products, titles of seminars, or other descriptive uses. Following are examples:

Acceptable:

Anderson Review, Inc.

Financial Analyst Seminars, Inc.

"Level II CFA® Exam Review Seminar" offered by Anderson Review, Inc.

"Sample Investment Foundations™ Exam Questions" offered by Exam Systems, Inc.

FINANCIALANALYSTPREP.COM

Not Acceptable:

CIPM Review Program

Chartered Financial Analyst Software Co.

CFAEXAMREVIEW.COM

D. Dos and Don'ts

CFA Institute should *not* be referred to as "The Institute", "the CFA Institute", or "CFAI". Never use CFA Institute in the possessive.

- *Incorrect:* CFA Institute's program
- **Correct:** A program of CFA Institute

When referencing Levels I, II, and III of the CFA exam, always use Roman numerals.

- *Incorrect:* Level 3 of the CFA exam..., CFA Level 3 exam
- **Correct:** Level III of the CFA® exam..., Level III CFA® exam

When referring to the curriculum, please ensure readers are able to differentiate between the CFA Program curriculum and prep provider material references.

When referring to the CFA Program curriculum, please do *not* use the following references:

- syllabus
- readings

When referencing Prep Courses, do so as follows:

- *Incorrect:* CFA Course, CFA Level I Prep Course, CFA Level I Review Program, CFA Level I Exam Prep
- **Correct:** CFA® Exam Level I prep course, CFA® Exam prep course, Level I Review Program for the CFA® Exam, Level I Exam Prep for the CFA® Program