

IAQFP Certified—Financial Planners, QFP—QUALIFIED FINANCIAL PLANNER Designation Usage Guidelines:

IAQFP Certified—Financial Planner, QFP—QUALIFIED FINANCIAL PLANNERS, are governed by and agree to be bound by the following **QFP Designation Usage Guidelines**, which are intended to both clarify and simplify the “alphabet soup/designations maze” of financial services designations under a single, unifying identifying designation, that serves to both distinguish Financial Planning as a separate and distinct area of concentration, while also bringing together all duly credentialed professionals making up that profession under the single identifier: **QFP—QUALIFIED FINANCIAL PLANNER**.

All **QFP—QUALIFIED FINANCIAL PLANNER Registrants** are also obligated to at all time follow each of these **IAQFP Standards**:

- **IAQFP Code of Ethics & Professional Conduct**
- **IAQFP Disciplinary Procedures & Complaint Process**
- **IAQFP Certified—Financial Planners, QFP Designation Usage Guidelines**
- **IAQFP Continuing Professional Education (“CEU”) Requirements**
- **IAQFP MEMBER & IAQFP Associate Affiliation Agreement**

Accepted forms of displaying or using the **QFP** designation in advertisements, letterhead, and business cards, etc., are (with or without bolding), but with first one listed here as our most preferred rendering with bolding of designation only:

- John A. Doe, **QFP—QUALIFIED FINANCIAL PLANNER**
- John A. Doe, **QFP**
- John A. Doe, **QFP** (2003 (using the year so earned by you) to present)
- John A. Doe, **QFP—QUALIFIED FINANCIAL PLANNER** (2003 (using the year so earned by you) to present)

When using any of the other (5) Financial Planning specific designations that we have determined to be substantially equivalent to unify them all under the single universal identifier of Financial Planning, **QFP—QUALIFIED FINANCIAL PLANNER**, we stipulate that **QFP** be placed at the start of the credentials line as in:

- John A. Doe, **QFP—QUALIFIED FINANCIAL PLANNER**, ChFC®, CFP®, PFS™, MSFS, MS

For other types of designations that indicate areas of specialization (i.e., like JD, CPA, CLU, Ph. D.), list them following the **QFP** designation and all other Financial Planning designations as in:

- John A. Doe, **QFP—QUALIFIED FINANCIAL PLANNER**, ChFC®, JD, CPA, Ph.D, CLU

The **QFP** Designation is listed on the [FINRA \(Financial Industry Regulatory Authority\)](https://www.finra.org/investors/professional-designations) website database of financial, professional designations, here: <https://www.finra.org/investors/professional-designations>