



## **Trademark Usage Guide for CFTe Holders**

If you have passed both levels of the Certified Financial Technician (CFTe) program or the equivalent of an IFTA accredited member society program and filed the required application with IFTA, you have the right to use the following marks:

- CFTe®
- Certified Financial Technician®

These marks are commonly referred to as the “CFTe Marks.” They are recognized symbols of the International Federation of Technical Analysts’ (IFTA) internationally recognized certification program in Technical Analysis.

CFTe Marks can only be used by CFTes who are not subject to certain Professional Conduct violations and whose rights to use the CFTe designation have not been suspended or revoked.

It is important to use these marks properly and to be mindful of improper use or infringement.

To assist you, IFTA has developed the trademark usage guide below. Please consult and follow this guide when preparing business cards, letterhead, promotional literature, signage, and all other forms of printed, electronic, and written communications.

### **Trademark Usage Guide**

The examples set forth here are intended to illustrate proper usage of the CFTe Marks. This is not an exhaustive list, nor is it an exhaustive discussion of your obligations, so if questions do arise please contact staff at IFTA by e-mail at [admin-at-ifta.org](mailto:admin-at-ifta.org). You should also contact IFTA staff if you become aware of improper usage or infringement of the CFTe marks.

## Certification Mark

### Purpose of the Certification Mark

The Certification Mark is used by CFTE holders as a distinctive visual symbol of the CFTE designation that can be easily recognized by employers, colleagues, and clients. In essence, use this mark as a seal of quality and integrity, in close proximity to your name.



IFTA Certified Financial Technician

download printed versions ([300dpi.jpg](http://www.ifta.org/public/files/images/i_ifta_cfte_logo.jpg) or [300dpi.eps](http://www.ifta.org/public/files/images/i_ifta_cfte_logo.eps)) at  
[http://www.ifta.org/public/files/images/i\\_ifta\\_cfte\\_logo.jpg](http://www.ifta.org/public/files/images/i_ifta_cfte_logo.jpg)  
[http://www.ifta.org/public/files/images/i\\_ifta\\_cfte\\_logo.eps](http://www.ifta.org/public/files/images/i_ifta_cfte_logo.eps)

### Use of the Certification Mark

- The certification mark may not be altered or modified in any way.
- The certification mark should be clearly printed in blue ink (#548) on light colored backgrounds or may be reversed to white on dark colored backgrounds.
- All reproduction of the certification mark must be made from camera-ready artwork provided by International Federation of Technical Analysts (IFTA).
- The certification mark can be used to identify a group of individuals; however, each individual listed must be a CFTE.
- The trademark notice does not have to appear on letterhead or business cards.
- The certification mark must not be used as part of a company name or logo.
- The certification mark should be placed in close proximity to the CFTE's name. However, the certification mark should have enough clear space that it is not connected or a part of the CFTE's personalization or degree. The certification mark shall not be confused with a company logo or placed in such close proximity to a company name or logo so as to give the reader the idea that the certification mark certifies the company.

## The CFTE® and Certified Financial Technician® Marks

### Purpose of the CFTE Marks

The trademarks CFTE® and Certified Financial Technician® are intended for use whenever the certification mark cannot be used.

### Use of the CFTE Marks

The CFTE® and Certified Financial Technician® marks should be used in the text of magazine and newspaper articles, interviews, books, advertising, and in textual or verbal contexts where use of the certification mark is impossible or impractical. When these marks are used in these contexts or applications, charterholders should carefully advise reporters, authors, editors, publishers, and others as to the guidelines for proper usage.

The CFTe® mark must not be used generically (as a noun) and should only be used as an adjective. If you are using the marks correctly, you should be able to omit the CFTe from a sentence and still have the sentence make sense. For example, “Randy Jones, CFTe, is a portfolio manager”.

**Proper**

- Randy Jones, CFTe, is a portfolio manager.
- Jane Smith is a holder of the right to use the Certified Financial Technician® certification designation.

**Improper**

- Jane Smith is a CFTe.
- Jane Smith and Randy Jones are CFTes.

The first and most prominent use of the CFTe® or Certified Financial Technician® marks in text material should include the registered trademark symbol (®). It is not necessary to use the ® symbol when the marks directly follow the name of a specific individual.

**Proper**

- Jane Smith is a CFTe® holder.
- Three analysts at the firm hold the Certified Financial Technician® designation.

Always specify in a tag line at the end of an article and at the bottom of an advertisement or promotional literature that the marks are the property of International Federation of Technical Analysts (IFTA).

**Proper**

- CFTe® and Certified Financial Technician® are registered trademarks owned by International Federation of Technical Analysts.

The CFTe® mark must appear with the first three letters capitalized and the fourth letter in lower case. With respect to Certified Financial Technician®, the first letter of each word must be capitalized.

**Proper**

- Jane Smith, CFTe
- Jane Smith, Certified Financial Technician

**Improper**

- Randy Jones, cfte
- Randy Jones, CFTE
- Jane Smith, certified financial technician

The form of the marks must never be altered to create a new word, phrase, or design.

The marks may never be used in the plural or possessive forms.

The CFTe® and Certified Financial Technician® marks must not be used as part of, or incorporated in, the name of a company or imply that the company is entitled to use the marks. Additionally, the marks may not be used in a CFTe's e-mail address or in a personal or company domain name.

**Proper**

- Randy Jones, Certified Financial Technician

**Improper**

- Randy Jones, Inc., Certified Financial Technician
- janesmithcfe.com