

## **Guide to Use of Designation Marks**

### **AIFA<sup>®</sup> and Accredited Investment Fiduciary Analyst<sup>™</sup>**

As an AIFA certificant, you are authorized to use the following two designation marks in your communications and associated materials. It is very important that you use the marks in accordance with these specific guidelines or you significantly reduce their value as trademarks.

#### **1. AIFA<sup>®</sup>**

- Never use periods.
- Use all capital letters.
- Always use the superscript <sup>®</sup> wherever the mark appears only once, or the first time it appears in a longer document or in the content of individual Web URLs. (Ex. John D. Smith, AIFA<sup>®</sup>)
  - In certain applications the “r” will automatically be circled if you type “(“, then “r”, then “)”, or you can use the command ALT 0174
- Always use AIFA as an adjective. (i.e., AIFA Designee, AIFA designation, etc.)

#### **2. Accredited Investment Fiduciary Analyst<sup>™</sup>**

- Always use the “TM” superscript wherever the mark appears only once, or the first time it appears in a longer document or in the content of individual Web URLs.
  - In certain applications the “tm” will automatically be superscripted if you type “(“, then “tm”, then “)”, or you can use the command ALT 0153
- Always use Accredited Investment Fiduciary Analyst as an adjective. (i.e., Accredited Investment Fiduciary Analyst Designee, Accredited Investment Fiduciary Analyst designation, etc.)

3. As a suggestion, the following description could be incorporated into your biography and also in any marketing materials:

“    Your name     has earned the Accredited Investment Fiduciary Analyst<sup>™</sup> (or AIFA<sup>®</sup>) professional designation from Fiduciary360. He (or she) has received formal training in investment fiduciary responsibility and is certified to conduct investment fiduciary assessments.”

4. Fi360 recommends that you include the following language at the back of your ADV:

"The AIF<sup>®</sup> and AIFA<sup>®</sup> trademarks are registered with the U.S. Patent and Trademark Office under the Center for Fiduciary Studies, a division of Fiduciary360."