



FINANCIAL
PLANNING
ASSOCIATION

Brand Standards Guide

**Let's change tomorrows.
Let's start today.**



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**Welcome to the
FPA Brand**

Who We Are

WHY

We believe in elevating the profession that transforms lives through the power of financial planning.

We believe in changing tomorrows.

HOW

We do this by cultivating a community that provides inspiration, growth, amplification, and belonging.

WHAT

We provide support that advances financial planning practitioners throughout every phase of their career, encompassing the business, practice, and profession of financial planning.

WHO WE SERVE

Our members are financial planning practitioners who share our values, who want to master the practice of financial planning and who help shape the future of the profession.

OUR CORE VALUES

We lead with power and purpose.

We are passionate about our calling.

We strive for personal and professional excellence.

We connect for collaborative impact.

We care for and support each other.

OUR CORE POLICY

The CERTIFIED FINANCIAL PLANNER™ certification and the standards it represents constitute the foundation of the financial planning profession.

**We believe in tomorrow.
And we trust our members
to shape it.**



Brand Promise

Our brand promise is communicated by two simple words:

Change tomorrows™

This is not just a tagline—it's a constant reminder to drive positive change for our members and their clients.

**Two words.
One promise.**



Brand Anthem

Tomorrow isn't just the next square on the calendar.
Tomorrow is impatient, unfocused and not into nostalgia.
Tomorrow is where uncertainty grows and fear lurks.
But it doesn't have to be that way. We have the power to change it.

After all, tomorrow is born from the ambition and optimism of today.

Let's give tomorrow purpose.

Let's fill it with hope.

Let's come together now and answer the call,
refining our craft and lending our voices.

Let's learn from the innovators of today, so we can change tomorrow.

Let's make our tomorrow better than today. And let's not stop there.

Let's change the tomorrows of our family and our friends.

Let's change tomorrows for the people we serve.

And for all those who need our service.

Let's change tomorrows.

And let's start today.

Tonality

At FPA

We Are Inherently and Unabashedly Helpful

We Are Consciously Member- and Stakeholder-Driven (First Person)

We Are Value-Driven and Rooted in Our Why

We Lead with Empathy and Create Content to Fill Needs

We're Not Afraid to Make You Laugh or Smile

We Are Conversational, Not Industrial

Tone of Voice

Company Culture (Who We Are) X **Our Story** (Why We Do What We Do) X **Empathy** (What It's Like to Work With Us)

Use this checklist as a tool when reviewing your content to become familiar and comfortable with the Voice of FPA.

- Is It Helpful?** The best content tells readers/viewers something they don't know, educates them further and/or helps solve important problems.
- Is It About the Member or Prospect?** Remember, it's not about what we want them to know, it's about their needs, wants, feelings and goals.
- Does It Make an Emotional Connection?** We want readers/viewers to feel something when they consume our content, building a positive connection and adding humanity to the brand.
- Does It Show Empathy for the Member/Prospect?** Our content needs to show the individual member of the chosen audience (we don't create content for "audiences," we create content for individuals) that we "get" them.
- Is It Conversational?** Nobody says "holistic" or "comprehensive" in casual conversation. The most engaging content is often written like we speak.
- Does It Fill a Need?** Content for content's sake is the enemy. We need to ensure our content is filling a true and important need.
- Does it Make You Smile or Laugh?** Even a little chuckle will do.
- Did You Have Fun Creating It?** Hey, if you didn't have fun making it, they probably won't have fun reading/viewing it.
- Would You Actually Want to Read/Watch It?** Vulnerability time. If you can answer "Yes" to this, you can bet that your readers/viewers will too.

Key Benefits

Since 2000, the knowledge and support that FPA provides has helped shape the futures of countless members.

FPA has inspired our members to take that next step and find a path forward so they can realize their full potential.

We accomplish this by providing four key benefits to our members:

Inspiration

Timely ideas, unique perspectives and forward-looking points-of-view that have value.

Growth

Knowledge, guidance and mentorship that helps members—and the profession as a whole—continually advance and improve so we can meet the changing needs of our clients and better serve them.

Amplification

A unified voice that represents our shared values, vision and collective interests on the stages and forums that matter most to raise awareness and bring the benefits of financial planning to more people.

Belonging

A receptive, participatory community where you feel heard, supported and involved.

Our members apply these benefits to their clients every day. A FPA financial planner can change the trajectory of their clients' lives so they can achieve a better future. It's what gets our planners out of bed in the morning.

**At FPA, we know that
financial planning isn't
just a job. It's a calling.**

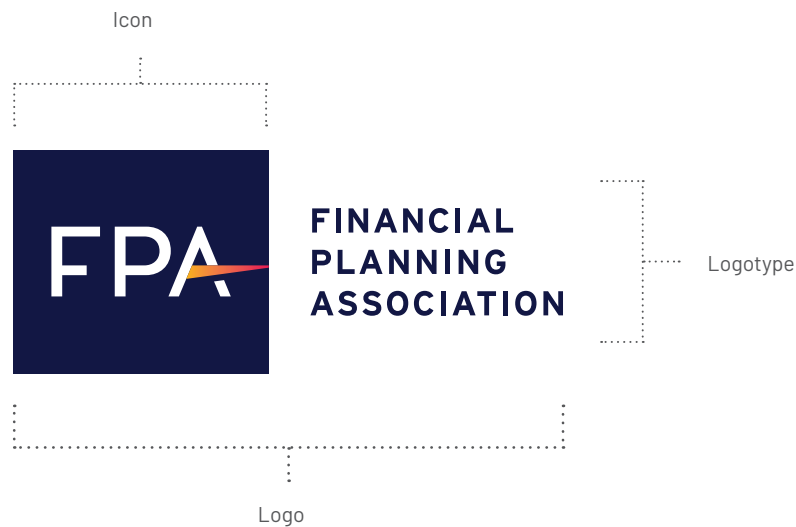


Visual
Identity

**Most people are
visual learners. So let's
make this interesting.**

Primary Logo

FPA communicates frequently about many topics that are all part of the FPA identity. By using a standardized format, we can maintain consistency and clarity, while continuing to build equity for FPA.



There are three acceptable uses of the FPA logo. The preferred version of the logo is to use the icon with the wordmark. However, the icon may be used alone or with the Change Tomorrows™ tagline.

ICON WITH WORDMARK



ICON ONLY



ICON WITH TAGLINE



Logo Sizing

MICRO LOGO

When the logo needs to scale below .5" use the one color logo. An example of this would be the FPA favicon for web.



MINIMUM SIZE ICON

.5"



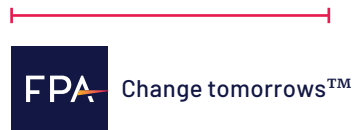
MINIMUM SIZE WITH WORDMARK

1"



MINIMUM SIZE WITH TAGLINE

1.65"



Chapter Logos

By using a standardized logo format across all chapters and state councils, we can maintain consistency and clarity, while building equity for the association.

ANATOMY OF A CHAPTER LOGO WITH ONE LINE OF TEXT



When the chapter name is shorter than "Association," the blue bar aligns with the "N".

**FINANCIAL
PLANNING
ASSOCIATION**

The amount of space between the wordmark and the chapter name is the same.

AUSTIN

Case: UPPERCASE
Font: Interstate Regular
Size: 12 pt
Leading: 15 pt
Tracking: 60 pt

**ANATOMY OF A CHAPTER LOGO
WITH TWO LINES OF TEXT**



When chapter name is longer than "Association" the blue bar aligns with the last letter of the chapter name.

Chapters with a long name require a second line of text. The second line reaches the bottom of the FPA icon.

AREA OF ISOLATION



**MINIMUM SIZE WITH
CHAPTER NAME**



REVERSE LOGO



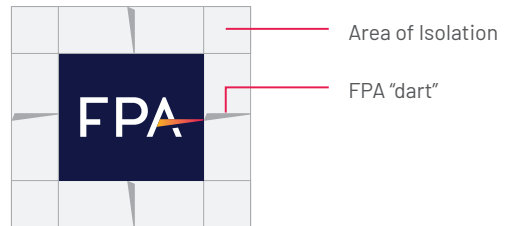
BLACK & WHITE LOGO



Logo Spacing

The area of isolation is an area of white space around the logo to prevent visual interference from other graphic elements. Do not allow other graphic elements to penetrate this area.

The area of isolation is equal to the width of the FPA “dart”.



Reverse Logos

When using the logo on a dark blue background, the reverse logo version should be used. In the reverse logo, the FPA “box” is the same color blue as the background and the type is white.



When using the logo for black and white printing, use the specified logos with no gradient in the FPA “dart”. This version of the logo can also be used as a one color logo for micro logo instances.



Color Palette

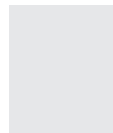
The new FPA blue is the dominant color in the new identity system. Yellow and red are the secondary colors that can bring a vibrant contrast when used on top of the blue. Those two colors also create a gradient that is used in the “dart” of the logo. This gradient can also be used as a secondary color. For a visual break from the bright colors, a tertiary palette of light gray can be used for body copy and smaller design elements.

MIDNIGHT BLUE



CMYK	100,95,37,47
PMS	2766 C
RGB	21, 25, 69
HEX	#151945

GRAY 1



CMYK	0, 0, 0, 10
PMS	Cool Gray 1 C
RGB	230, 231, 232
HEX	#e6e7e8

SUN YELLOW



CMYK	1, 34, 99, 0
PMS	7409 C
RGB	248, 176, 28
HEX	#f8b01c

GRAY 2



CMYK	0, 0, 0, 20
PMS	Cool Gray 2 C
RGB	209, 211, 212
HEX	#d1d3d4

FIRE MAGENTA



CMYK	3, 99, 61, 0
PMS	1925 C
RGB	230, 32, 81
HEX	#e62051

GRAY 3



CMYK	0, 0, 0, 40
PMS	Cool Gray 6 C
RGB	167, 169, 172
HEX	#a7a9ac

FPA GRADIENT



The FPA gradient should always go from Sun Yellow to Fire Magenta.

GRAY 4



CMYK	0, 0, 0, 80
PMS	425 C
RGB	88, 89, 91
HEX	#58595b

Type & Fonts

BARLOW TYPEFACE

The typeface that will be used for headlines, subheads and callouts is Barlow. Barlow comes in a variety of weights, all with italics, and is open source and free to use on the web and print. The typeface is available for free from Google Fonts.

MERRIWEATHER TYPEFACE

The typeface that will be used for all body copy is Merriweather. Merriweather comes in a variety of weights, all with italics, and is open source and free to use on the web and print. The typeface is available for free from Google Fonts.

BARLOW BOLD

Aa

MERRIWEATHER BOLD

Aa

BARLOW SEMIBOLD

Aa

MERRIWEATHER REGULAR

Aa

BARLOW REGULAR

Aa

SYSTEM FONTS

When Barlow and Merriweather are not available use these system fonts as a replacement.

ARIAL

Aa

GEORGIA

Aa

HEADLINE

**Headlines should
be set in Barlow Bold.**

SUBHEAD

Subheads should be set in Barlow Semi Bold.

CALLOUTS

CALLOUTS SHOULD BE SET IN BARLOW BOLD.

BODY COPY

Body copy should be set in Merriweather Regular. Use Merriweather Bold to make parts of body copy **stand out more.**

To add these fonts to your computer, download them from MediaValet, open the Fonts program on your computer and drag the new fonts from your Downloads folder to your Fonts folder.

Photography

Use bold vibrant images that do not have people looking straight into the camera. The images should portray real people. Select images that use the rule of thirds for the subject matter, or the subject is directly center of frame.

Resist using trite images that are overused in financial institution marketing materials. These images include, but are not limited to, photos and illustrations of money, bull and bear market images, older men in pin-striped suits, etc. The Financial Planning Association is for the modern world and we embrace diversity and opportunity for all.



Graphic Elements

Repeating the FPA box can create a dynamic shape to place type inside of. The gradient should always go from Yellow to Magenta.



Use a stroke to make a headline stand out. The width should match the width of an ascender of a letter in the headline, such as an "l".



Use a stroke of color to underline important pieces of information.



Using the same ratio as the FPA box, you can create a gradient stroke for type to be placed inside of. The gradient should always go from Yellow to Magenta.



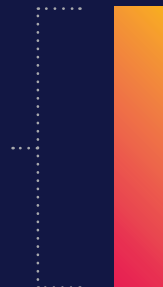
Use the FPA "dart" as a large graphic element as to bring a lot of color to a collateral piece.



Use basic shapes to create abstract layouts for covers and collateral material. The gradient always should go from Yellow to Magenta.



Using a rectangle with the FPA gradient is another great way to bring some color to a piece of collateral.



Creative Examples

EXAMPLE LAYOUTS

FPA 2019 ANNUAL REPORT

Business Support



FPA Research and Practice Institute™

Succession Challenge 2019
FPA revealed research and whitepapers in partnership with Janus Henderson Investors that uncovered the challenge financial planners have in planning their eventual transition out of business.

2019 Trends in Investing
FPA and the Journal of Financial Planning partnered to conduct annual research on investing trends for 2019 and beyond.

State of Client Understanding
FPA partnered with Capital Preferences and T. Rowe Price to conduct new research on the steps financial professionals take to understand their clients and build relationships.

FPA Member Discount Program (MDP)

Formerly the FPA Member Advantage Program (MAP), the most popular benefits of the MDP include the FPA Group Long Term Disability and Term Life Insurance programs with Ryan Insurance Strategy Consultants. In 2019, FPA will be exploring opportunities to offer FPA members additional options and competitive pricing in areas of FinTech, select business support areas, and group health insurance.

FPA Coaches Corner

In April 2018, FPA launched the FPA Coaches Corner to make the thought-leadership of the industry's top coaches available to members. All coaches who held sessions at the 2018 FPA Annual Conference enjoyed standing room only crowds. In January 2019, FPA introduced Barbara Kay of Barbara Kay Coaching as our new Career Coach and will look to add coaches covering Technology and Business Efficiencies later in the year.

FPA MediaSource

As of the end of 2018, more than 1,100 CFP® professional FPA members are participating in FPA MediaSource and more than 3,300 queries have been sent to members since inception. The first step for CFP® professional members to be part of FPA MediaSource is to participate in a virtual all-member media training.

Supporting Our Members



At the 2018 FPA Annual Conference, FPA was pleased to announce Harold Evensky, CFP® as the recipient of FPA's and the profession's highest individual award—the 2018 F. Kemp Fain, Jr., Award. This pinnacle of recognition, in honor of the late F. Kemp Fain, Jr., CFP®, is bestowed on an individual who has made significant contributions to the advancement of the financial planning profession. Learn more about this prestigious award and Harold's many contributions.






2020 Conferences & Events

FPA ANNUAL RETREAT

FPA Retreat gathered over 350 of the leaders in the financial planning profession to experience advanced presentations, compelling peer-to-peer learning sessions and highly engaging conversations Apr. 23–26 in Litchfield Park, AZ.

FPA NEXGEN GATHERING

More than 200 attendees representing the next generation of financial planners came together at FPA NexGen Gathering to discuss hot topics and trends facing the future of the financial planning profession and engage with peers and FPA leadership June 24–26 at the University of California – Santa Barbara.

FPA FPA RESIDENCY

FPA offered immersive, experiential, learning-focused Residency programs to more than 60 new or soon-to-be CFP® professionals June 8–13 and Oct. 19–24 in Denver, CO.

FPA ANNUAL CONFERENCE

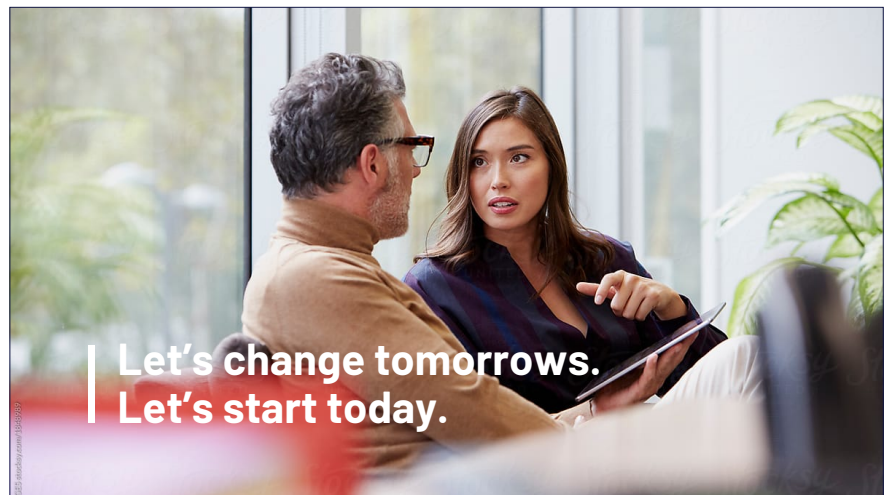
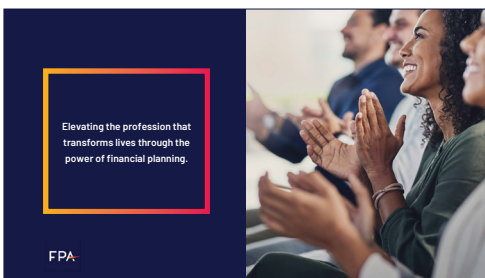
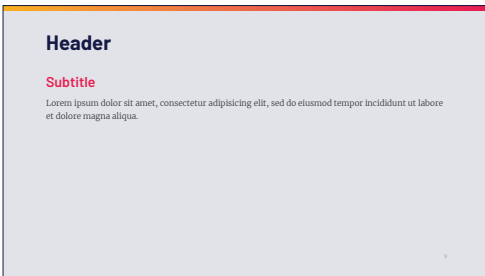
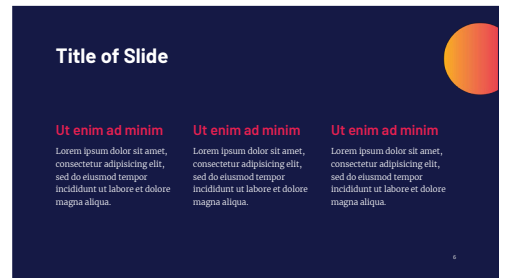
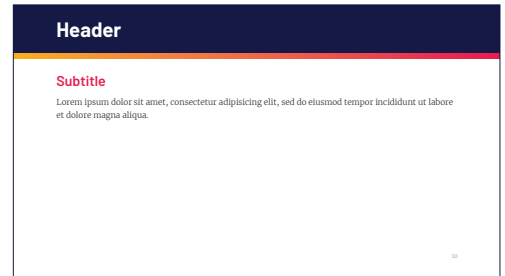
This event, held Oct. 3–5 in Chicago, attracted more than 2,000 attendees from around the world to experience highly rated speakers, continuing education sessions and roundtable discussions.

FPA BRAND STANDARDS GUIDE
Visual Identity

25

Powerpoint

POWERPOINT TEMPLATE



Social Media

FPA’s social media channels should also stay consistent with the standards for the new brand identity. Use the colors and design elements the same as you would for any print collateral.

FPA TWITTER HEADER




FPA CHAPTER TWITTER HEADER TEMPLATE



Social avatar for all channels should be the FPA logo without the wordmark.


Email

FPA emails should follow the same brand guidelines as the social and print collateral. Refer to the Font section of the brand guide for what system fonts to use for email.



FPA Change Tomorrows™

A Note From
Lauren Schadle
CAE, EXECUTIVE DIRECTOR/CEO



I hope you've marked your calendar and registered to attend and participate in the **2019 OneFPA Chapter Leaders Conference**, November 15-17 at the Gaylord Rockies Resort & Convention Center in Aurora, Colorado. I look forward to welcoming FPA's volunteer leaders and chapter executives for networking, sharing of best practices and information, and training to energize and support you and your chapter for the year ahead! Register now!

Lauren Schadle

News You Need To Know

2020 FPA Chapter Dues (ACTION REQUIRED BY 10/15)
FPA chapters should submit 2020 chapter dues submissions for the CFP® Professional and Allied Professional membership categories by October 15. Even if your chapter does not have changes to current dues, we kindly ask that you complete this process.

[SUBMIT 2020 DUES](#)

Pro Bono Award Winner To Be Recognized
The FPA of Georgia chapter will be honored at the FPA Annual Conference as the first recipient of the Power of Financial Planning Award for its outstanding pro bono programming. Congrats to FPA of Georgia for its commitment to changing lives through the power of financial planning.

[LEARN ABOUT THE AWARD](#)

Read the FPA Next Generation Planner
Share this monthly publication with your Section members. The content is targeted toward supporting their personal and professional growth as they work their way toward their most important career goals.


[DOWNLOAD APP](#)

Access Turnkey Local Learning Programs
Learn about on-demand courses, "programs in a box," and more resources available to all chapters in *How Does FPA Support Chapters?*, an overview of the services FPA provides to chapter leaders.

[ACCESS NOW](#)

Resources

The Fall Membership Drive is Here!




Through October 31, FPA is offering exciting deals to grow and strengthen our community:

- A one-time, 40% savings on dues for new CFP® Professional and Allied Professional members (coupon code: FALL40DP)
- New members get an FPA coaster
- Administrative fees will be waived for new FPA Group Memberships (a savings of \$250)

[LEARN MORE](#)

New at FPA

New Definition for Pro Bono Financial Planning



We are pleased to share a joint statement resulting from the first-of-its-kind Nonprofits CEO Summit on Pro Bono Financial Planning, convened to advance and expand pro bono service within the financial planning profession. As a result of this meeting, the following shared definition of pro bono financial planning has been adopted:

Free, no-strings-attached financial advice and planning for underserved people¹ provided by or in conjunction with a CFP® professional volunteer. These services will be delivered through one-on-one engagements or through interactive group sessions on topics specific to an at-risk audience, with the option for personalized engagement to follow.

(¹e.g., low-income individuals and families, military personnel/veterans, domestic violence survivors, people affected by natural disasters, serious medical crises, bankruptcy, etc.)

[QUESTIONS](#)

Upcoming Meetings

VIRTUAL OFFICE HOURS
First Thursday of the month at 1 pm ET
Connect at <https://zoom.us/j/209872784>

MONTHLY CHAPTER LEADER LEARNING CALL
Thursday, October 10 at 1 pm ET
Topic: Chapter Operational Planning
Join at <https://zoom.us/j/206725213>


2019 ONEFPA CHAPTER LEADERS CONFERENCE
November 15-17
Register and book your hotel by October 23!

DID YOU MISS SEPTEMBER'S NEWSLETTER?
If you had valuable information about important dates and access to a resource highlighting by deadlines and procedures to support your FPA Chapter Elections. [Read it now.](#)

Don't forget: The **monthly Take 1** for chapter leaders is a timely resource with five news items your chapter can use to easily promote the value of FPA membership.

HAVE A QUESTION?
Contact us at Chapters@OneFPA.org.

CONNECT WITH US



Responsible. Reliable. Resourceful.

THAT'S OUR TEAM'S COMMITMENT TO YOU.
Our goal is to provide exceptional member service. If your needs were not handled in an efficient and professional manner – or if you had a positive experience you'd like to share – we want to hear from you. Please call (888) 866-7568 or email us at feedback@onefpa.org.

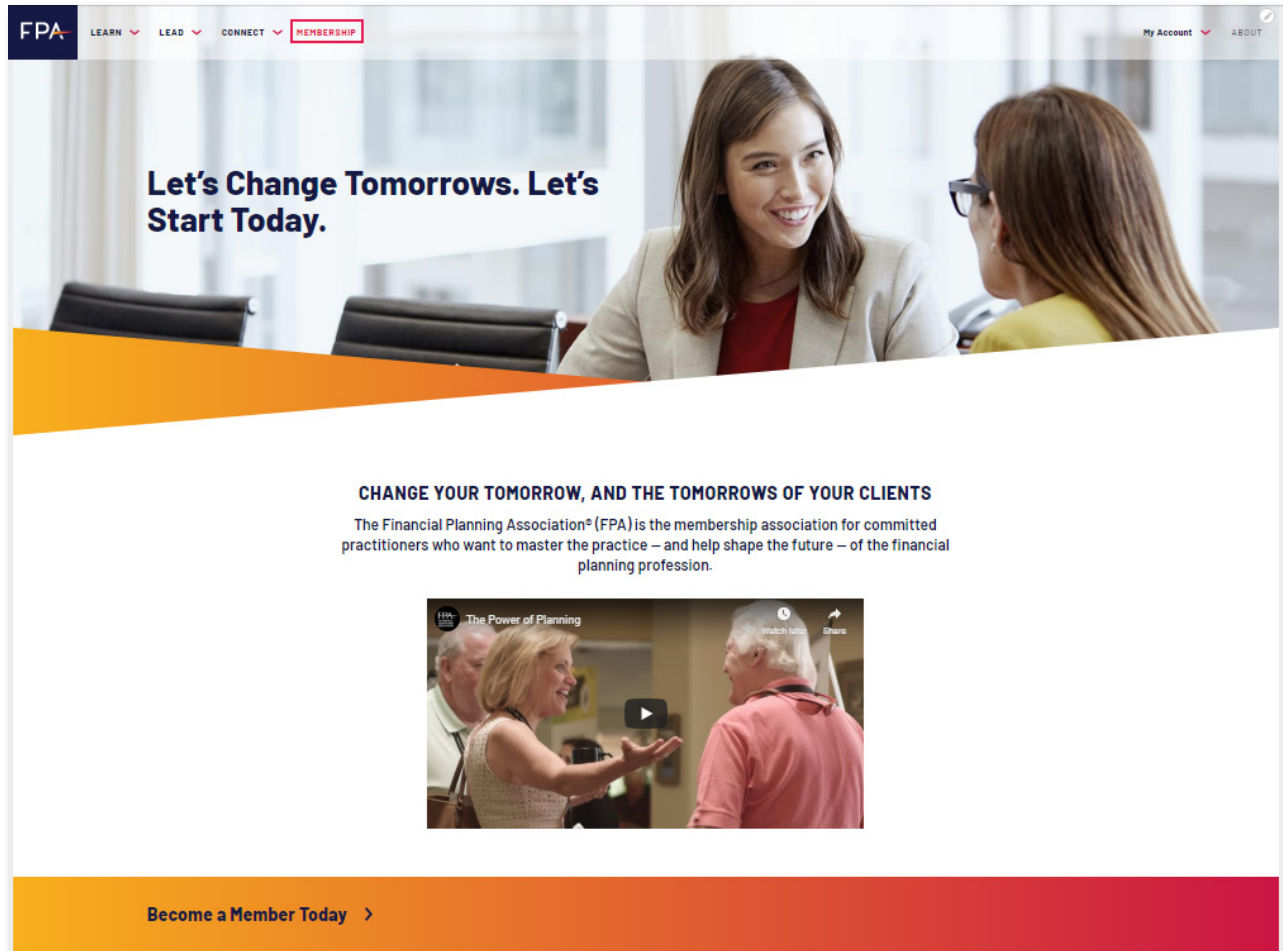
[Update Communication Preferences | Unsubscribe](#)

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Memberservices@OneFPA.org

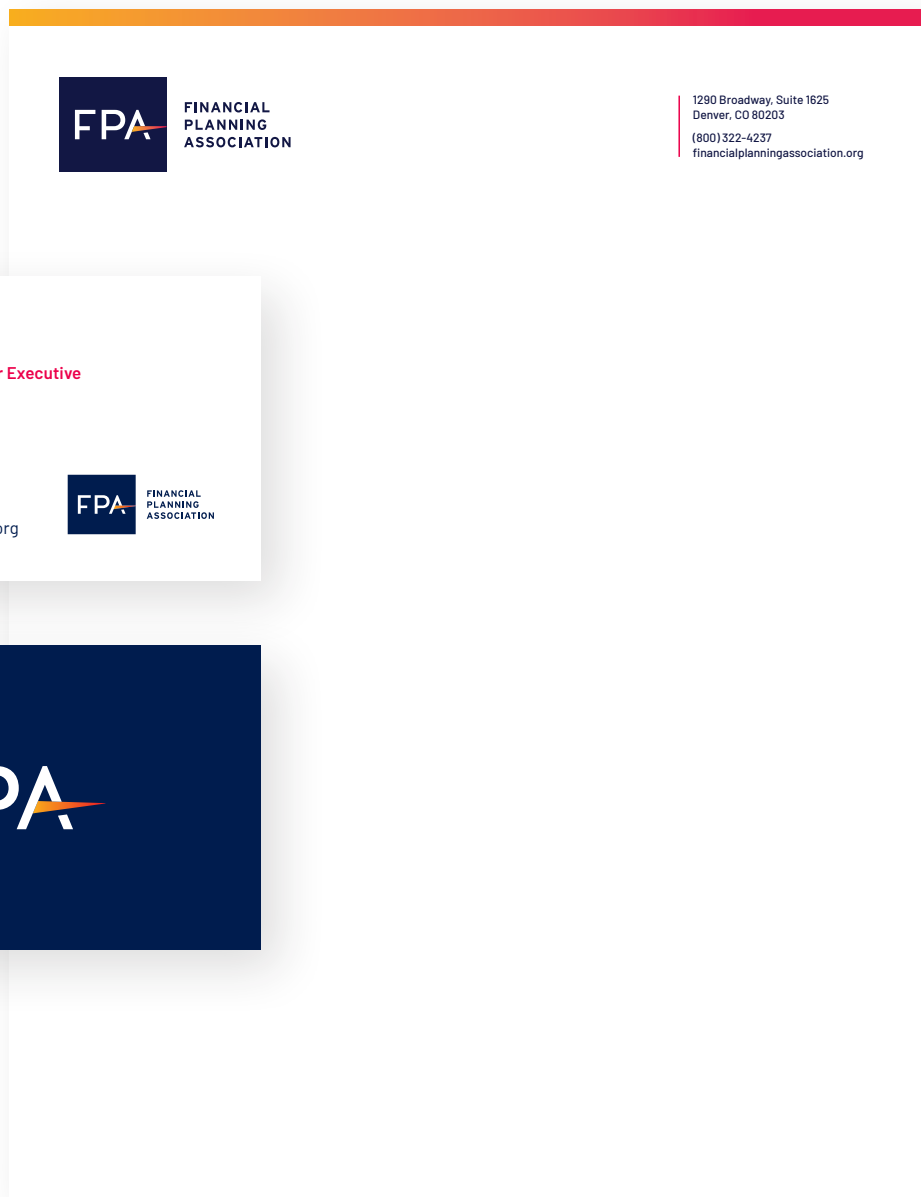
FPA

Website



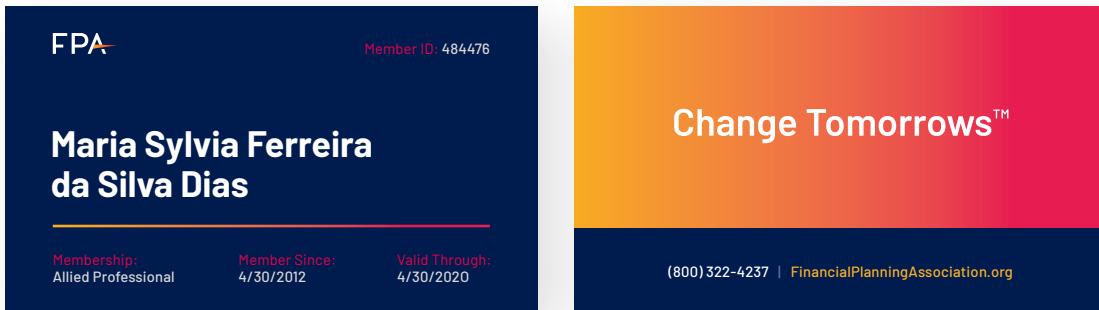
Stationery

The FPA stationery uses the light gray hue with a pop of color to create a bold and sophisticated look.



Membership Collateral

MEMBERSHIP CARD



LONGEVITY CERTIFICATE





Become the Best Financial Planner You Can Be

You Belong at the Financial Planning Association®



(800) 322-4237 | memberservices@onefpa.org | financialplanningassociation.org

Belonging

The Financial Planning Association gives you access to a receptive community unlike any other where you feel heard, supported and involved. When you become a member, you'll have a wealth of opportunities to connect with the most skilled, passionate and diverse group of financial planners in the country.

Engage With Planners in Your Area

FPA has 86 chapters and two state councils that offer in-person and virtual events specific to your area. Your local chapter is the perfect place to get face time with practitioners, members and financial planning thought leaders—right in your own backyard!

Join the Conversation on FPA Connect

Our compliance-friendly online community is the best place to find the questions, answers and topics that are most important to you.

Participate in FPA Knowledge Circles

Connect intimately with other FPA members on the areas of the profession you are most passionate about through virtual and in-person hosted gatherings and discussions.

Connect Through FPA Activate Facebook Group

This vibrant social media forum is designed to be the go-to community and safe space for financial planners who are new to the profession and understand financial planning, develop their skills and make informed career choices.

Build Your Network at FPA Signature Events

Our signature events are one of the most powerful ways for members to lend their voices to the conversation, share ideas and be an integral part of moving our community forward.

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“FPA is an amazing support system filled with passionate financial planners who help each other every day. In my 20-plus years of experience in the financial planning profession, I have never encountered any other group that was so interested and willing to share their intellectual capital and to support new participants in our profession.”

Evelyn Zohlen, MBA, MS, CFP®
FPA Past President and 2020 FPA Chair

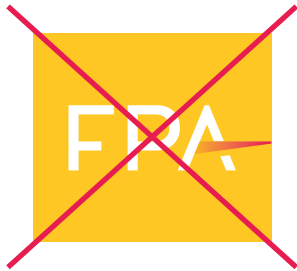
What Do I Get From My FPA Membership?

financialplanningassociation.org | 3



What Not To Do

As long as you follow the brand guidelines, you should be okay. Just in case, here are some examples of what not to do with the FPA logo.



Do not alter the color of the logo.



Do not reverse the logo out of a photograph.



Do not put type inside the box.



Do not create a new position for chapter names.



Do not reposition the logotype.



Do not fill the box with a pattern.

Do not use imagery of money or other stereotypical financial services imagery (piggy banks, stocks, bulls, bears, etc).



FPA