



TRADEMARK USAGE GUIDE FOR CMT CHARTERHOLDERS

While you are a CMT Charterholder, as defined in the CMT Association By-Laws (PDF), you have the right to use the following marks:

- CMT®
- Chartered Market Technician®

These marks are commonly referred to as the “CMT Marks.” They are recognized symbols of professionalism and integrity that distinguish charterholders from other investment professionals around the world.

The uses of the CMT Marks are governed by the Code of Ethics and standard VII(B) of the Standards of Professional Conduct and applicable laws. CMT Marks can only be used by charterholders who are Members in good standing not subject to certain Professional Conduct violations and whose rights to use the CMT designation have not been suspended or revoked.

Use of the CMT Marks signifies that you have earned the prestigious CMT charter. It is important to use these marks properly and to be mindful of improper use or infringement.

To assist you, CMT Association 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 CMT Marks. This is not an exhaustive list, nor is it an exhaustive discussion of your obligations, so if questions do arise please contact the CMT Association staff by e-mail at admin@cmtassociation.org. You should also contact staff if you become aware of improper usage or infringement of any of the CMT Association marks.



Certification Mark



Purpose of the Certification Mark

The Certification Mark is used by charterholders as a distinctive visual symbol of the CMT 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.

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 black ink 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 CMT Association.
- The certification mark can be used to identify a group of individuals; however, each individual listed must be a current charterholder.
- 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 charterholder's name. However, the certification mark should have enough clear space that it is not connected or a part of the charterholder'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 CMT® and Chartered Market Technician® Marks

Purpose of the CMT Marks

The trademarks CMT® and Chartered Market Technician® are intended for use whenever the certification mark cannot be used.

Use of the CMT Marks

The CMT® and Chartered Market 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 visual certification mark is impossible or impractical. When these text-only 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.

Generic use

The CMT® mark must not be used generically (as a noun) and should only be used as an adjective. The mark becomes generic when it is used as a common name for a category of products or services. References to all facial tissues as Kleenexes, all photocopiers as Xeroxes, and all market technicians as "CMTs" are improper and are considered generic. If the use becomes generic, CMT® charterholders lose their exclusive use of these valuable marks. If you are using the marks correctly, you should be able to omit the CMT from a sentence and still have the sentence make sense. For example, "John Smith is a CMT charterholder."

Proper

- John Smith is a CMT® charterholder.
- Amy Jones, CMT, is a portfolio manager.
- John Smith is a holder of and has the right to use the Chartered Market Technician® designation.

Improper

- John Smith is a CMT.
- John Smith is a Chartered Market Technician.
- John Smith and Amy Jones are CMTs.



Registered Trademark Symbol

The first and most prominent use of the CMT® or Chartered Market 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

- John Smith is a CMT® charterholder.
- Three analysts at the firm hold the Chartered Market Technician® designation.

Property of CMT Association

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 CMT Association.

Proper

- CMT® and Chartered Market Technician® are registered trademarks owned by CMT Association.

Proper Capitalization

The CMT® mark must appear in all capital letters. With respect to Chartered Market Technician®, at a minimum, the first letter of each word must be capitalized.

Proper

- John Smith, CMT®
- John Smith, CMT
- John Smith, Chartered Market Technician®

Improper

- Amy Jones, Cmt
- John Smith, chartered Market Technician

Modification or Incorporation

The CMT® and Chartered Market 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 charterholder's e-mail address or in a personal or company domain name.

Improper

- Amy Jones Chartered Market Technician Advisory, Inc.
- www.johnsmithWealthCMT.com

ADDITIONAL GUIDELINES

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.