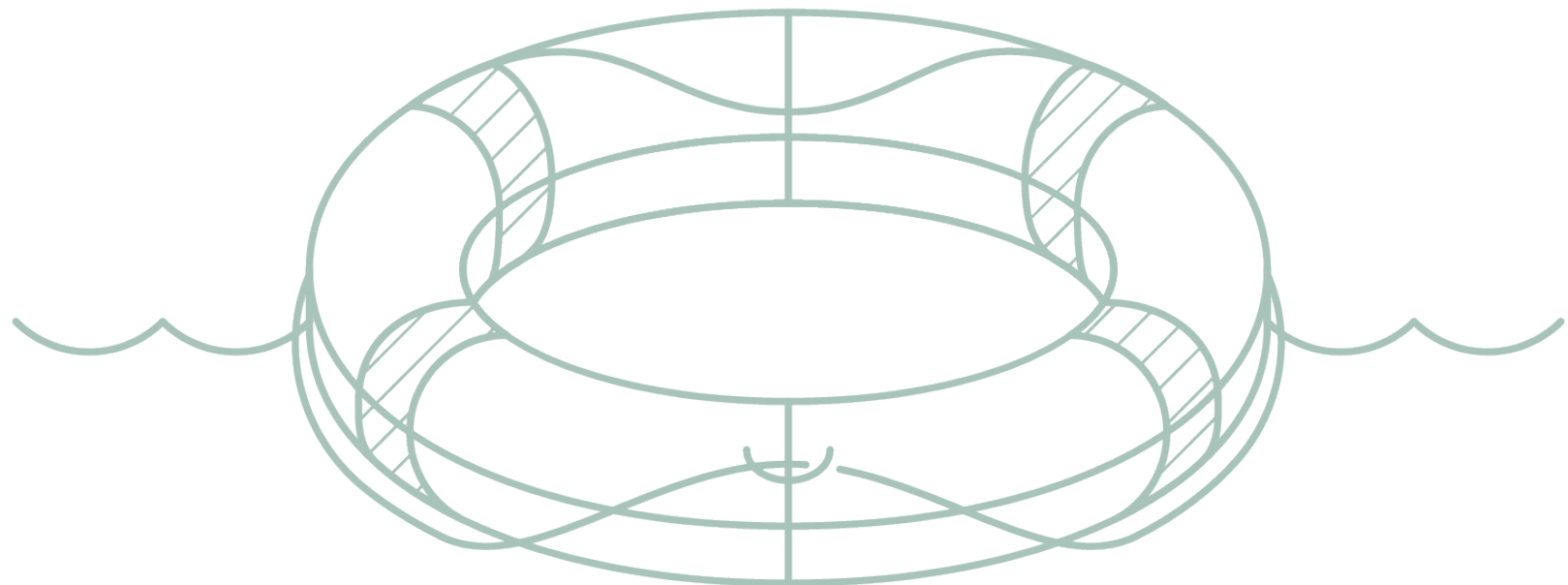


# TRADEMARK USAGE GUIDE FOR CMT CHARTERHOLDERS





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## Introduction

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](mailto: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 photocopies 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.

## CMT Credly Badge

Credly is a leading digital credentialing platform that enables individuals to showcase and share their verified skills and achievements online, enhancing transparency and trust for employers and peers. The CMT Credly Badge is an important digital representation of this achievement. The following guidelines ensure proper and consistent use of the CMT Credly Badge.



1. **Eligibility:** Only individuals who have successfully completed all requirements of the CMT Program and have been awarded the CMT designation and charter by CMT Association are eligible to use the CMT Credly Badge.

The badge is issued through Credly, you will need to create an account on Credly and claim the badge. Please be sure to use the same email id as the one you have used while applying for the charter..

### 2. Proper Use of the Badge:

- a. Display: The CMT Credly Badge must be displayed on digital platforms such as LinkedIn, email signatures, personal websites, and professional portfolios where possible.
- b. Linking: The badge must link back to the Credly platform where viewers can verify the credential's authenticity. This ensures that the badge remains credible and trustworthy.
- c. Accuracy: The badge must always be used accurately and in a way that reflects the holder's current status. If a member's CMT designation is revoked or suspended, they must immediately cease using the badge.

### 3. Prohibited Uses:

- a. Alteration: The badge must not be altered, including changing colors, resizing disproportionately, or adding additional text or graphics.
- b. Misrepresentation: The badge must not be used in a manner that implies the holder has qualifications or endorsements that they do not possess.
- c. Unauthorized Use: Non-holders of the CMT designation are strictly prohibited from using the CMT Credly Badge.

### 4. Badge Expiry and Renewal:

- a. The CMT Credly Badge does not expire as long as the individual maintains their CMT designation in good standing.
- b. If the CMT Association updates the badge design or standards, holders may be required to update their badge to the latest version.

5. **Reporting Misuse:** Any misuse of the CMT Credly Badge should be reported to the CMT Association immediately. Misuse may result in disciplinary action, including revocation of the CMT designation.

6. **Compliance:** By using the CMT Credly Badge, the holder agrees to comply with these guidelines and any additional terms set forth by the CMT Association. The CMT Association reserves the right to modify these guidelines at any time and may take legal action to protect its intellectual property and brand integrity.

### 7. How to Update Your LinkedIn:

- **Update your LinkedIn Profile**



Once you've earned your CMT® designation, follow these steps to update your LinkedIn profile:

If you hold the CMT® designation and are an active member in good standing, you may list your designation after your name. For example, Jane Doe, CMT®.

*Certificates from the CMT Association should not be added after your name.*

**\*\*Add as a Featured Section at the Top of Your Profile\*\***

- a. Log in to LinkedIn and view your profile.
- b. Select "Add profile section."
- c. Under "Add to Profile," choose "Recommended," then "Add featured."
- d. Click the "+" icon and select "Add a Link." Paste your unique badge link from Credly (see the Digital Badges section above for details).
- e. Select "Add" to create a new section where you can provide a title and description.
- f. Enter the title of your designation, such as "CMT® Charterholder" or "Chartered Market Technician (CMT®)."
- g. Write a brief description, including the year your designation was awarded.
- h. Select "Save."
- i. If you have completed the program but are awaiting the designation, please wait till you are awarded the designation and your charter.

#### **- Add to the Licenses & Certifications Section of Your Profile**

- a. Log in to LinkedIn and view your profile.
- b. Select "Add profile section."
- c. Under "Add to Profile," choose "Recommended," then "Add Licenses & Certifications."
- d. Name: Enter the name of your credential, Chartered Market Technician (CMT®)
- e. Issuing Organization: Start typing "CMT Association" and select it from the dropdown.
- f. Issue Date: Select the month and year you received your designation or certificate.
- g. Expiration Date: Leave this field blank. If you no longer meet membership requirements, a notification will appear on your badge page indicating your designation is expired.
- h. Credential ID: Leave this field blank.
- i. Certification URL: Add your unique badge link from Credly (refer to the Digital Badges section below).
- j. Select "Save."

Learn More about CMT Charterholder's Credly Digital Badge - <https://cmtassociation.org/development/digital-badging/>

Learn how to Manage & Share Your Digital Credentials - <https://learn.credly.com/blog/how-to-manage-share-your-digital-credentials>





## What To Use As a Candidate

As you embark on your CMT journey, we encourage you to use the right representation of your current CMT Journey across social media and other platforms. Do not use your candidacy in the Heading of your profile, and avoid indicating an "Expected" date. The Code and Standards prohibit representing partial designations.

We ask that you to adhere to the right practices as listed below:

### Proper

- Alex Brown, CMT Level I Candidate
- Sam Jones, CMT Level II Exam Candidate

### Improper

- "Jane Doe, Future CMT"
- Pat Smith, CMT I," "CMT II," etc.

Always be sure to use terms clearly indicating your candidacy.

- Someone who has not yet passed the Level I Exam is a Level I Candidate.
- Someone who has passed the Level I exam and is studying for Level II is a Level II Candidate.
- Passing Level II makes a person a Level III candidate.

## How to Share on Your Resume or Bio

The CMT Association encourages all designation holders and program candidates to include their designations and program participation on their resumes and online bios.

For CMT® Charterholders and CMT® Program candidates, please review the relevant guidelines above.

For those who have earned the charter from the CMT Association, include it in the certifications or education section of your resume or CV, along with the date of issuance.

## How to Share on Your Business Cards

If you hold the CMT® designation and are an active member in good standing, you may include your designation after your name on your business card. For example, Jane Doe, CMT®.

To display your achievement, add a line beneath your name that says "Awarded [Certificate Name], CMT Association, [Year of Completion]." For instance, "Awarded Chartered Market Technician®, CMT Association, 2024."