Trusted Adviser Mark Guidelines - Pre-public Launch

The public launch of the Trusted Adviser mark is scheduled for February 2021 to coincide with the new financial advice regime start on March 15. However, qualifying members are welcome to use the mark now.

Benefits of using the Trusted Adviser mark

- Provides a way to differentiate yourself in the market at a time when the designations RFA and AFA are disappearing.
- Shows your competence, professionalism and ethical focus.
- Gives you added credibility.
- Visually shows your connection to a Professional Body.
- The mark supports increased trust between you and the public.

Use of the Trusted Adviser mark

Only qualifying members who have received confirmation from Financial Advice NZ can use the Trusted Adviser mark. As anyone can use the words "trusted adviser", we strongly recommend you use the mark and not the words to promote yourself. It is only the mark which will be protected under trademark (pending).

At present only individual advisers can qualify to use the mark, therefore the mark must be used in direct relation to an individual adviser's name rather than the firm's name.

What you can do to promote yourself as a Financial Advice NZ Trusted Adviser;

- Add the Trusted Adviser mark next to a qualifying adviser's name in your "About us" or "Team" section of your website.
- Add the Trusted Adviser mark to an adviser's email footer.
- Add the Trusted Adviser mark to an adviser's business card.
- Add the Trusted Adviser mark to an adviser's LinkedIn profile.
- Add the Trusted Adviser mark to your brochures, signs and other marketing collateral but only if it can be directly linked to the name of an individual adviser.

Size & colours of mark

- Please ensure the mark is sized proportionally to your firm's logo. The Trusted Adviser mark should be visibly smaller than your firm's logo to ensure there is no mis-understanding about the role of Financial Advice NZ.
- Try and have the Trusted Advice mark big enough to enable people to read the Financial Advice New Zealand line.
- For a white or near-white background, we prefer you use the full-colour version of the mark. You can also choose to use the black version.
- For dark backgrounds, please use the white version of the mark.
- For all colours, please ensure the ribbon aspect of the mark is clearly visible.
- You will be provided with PNG and AI file formats. AI (vector) is best for giving to designers for printing business cards, brochures etc. PNG is best for web and email.

Full colour - for white or light backgrounds – preferred logo

Black - Alternative for white or light backgrounds

White - For dark backgrounds only

For any queries, please contact [Sarah Christian](), Manager Governance & Policy 0800 432 101

To protect the integrity of the mark please:

- Don't use the mark in a way that implies your firm has Trusted Adviser status. At present only individual advisers can qualify to use the mark.
- Don't show the mark next to the name of an adviser who has not been confirmed as a Financial Advice NZ Trusted Adviser, or is no longer a member of Financial Advice NZ or who has been advised they no longer qualify to use the Trusted Adviser mark.
- Don't try to explain what a Financial Advice NZ Trusted Adviser is on your website or other marketing collateral. Once launched, Financial Advice NZ will have a page on its website to explain what the Trusted Adviser mark represents. We will request you link your mark to this page from February onwards to help strengthen the value of the mark.

For any queries, please contact Sarah Christian, Manager Governance & Policy 0800 432 101