



DFSA™ Trademark Agreement

As a holder of CSI Global Education Inc.'s ("CSI") DFSA™ designation, you are licensed to use the DFSA™ certification mark (the "Certification Mark").

1. Licensee acknowledges that CSI owns the entire right, title and interest to the Certification Mark.
2. CSI hereby grants the Licensee a non-exclusive license to use the Certification Mark in association with the provision of financial services to the public for a one-year term, commencing on the date the licensee is granted the DFSA™ designation. Licensee hereby explicitly acknowledges that licensee is not entitled, by virtue of having earned this designation, to its use other than under the terms of this license. This Agreement and the license granted hereunder will be renewed automatically every year for another one-year term upon payment of an annual renewal fee and provided the licensee is otherwise in compliance with all the requirements associated with the DFSA™ designation and conveyed to Licensee by CSI.
3. In order to maintain the right to continue to use the Certification Mark, the Licensee agrees to maintain any and all standards for the character and quality of the services to be provided in association with the Certification Mark. CSI shall convey such standards to the Licensee from time to time. Such standards shall include but not be limited to the DFSA™ Code of Ethics. Licensee also agrees to earn any continuing education credits required by CSI.
4. Licensee agrees that CSI may monitor the provision of services provided by the Licensee in association with the Certification Mark and that, in the event, CSI determines that the quality of those services does not meet the standards set by CSI, CSI may terminate the license upon 60 days notice. The Licensee agrees that the final determination with respect to the termination of this license shall be made by the Designation Ethics Committee. Upon termination of this license, the Licensee shall immediately cease to use or display the Certification mark and/or DFSA™ Trademark for any purpose whatsoever.

5. Licensee shall, at all times, display the Certification Mark in accordance with the Certification Mark guidelines. As a licensee of the Certification Mark:
 - You can use the Certification Mark as a distinctive visual symbol of the DFSA™ designation that can be easily recognized by employers, colleagues, and clients. In essence, as a designation holder, you can use this mark as a seal of quality and integrity.
 - The Certification Mark may not be altered or modified in any way.
 - To ensure that the Certification Mark appears properly, all reproductions of the Certification Mark must be made from camera-ready artwork provided by CSI.
 - The Certification Mark can be used to identify a group of individuals; however, each individual listed must be a current DFSA™ designation holder.
 - The Certification Mark must not be used as part of a company name.
 - The Certification Mark should be placed in close proximity to the licensee's name. However, the Certification Mark should have enough clear space that it is not connected or a part of the licensee'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.

6. Licensee agrees to notify CSI, without delay, of any circumstances that may affect the licensee's ability to continue to fulfill the certification requirements.