AICPA Personal Financial Planning Section

Success Tips for Young CPAs and Financial Planners

Presented by:

Michael Goodman, CPA/PFS (Moderator)

Mark Astrinos, CPA/PFS

David Oransky, CPA/PFS

Helpful Hints

Adjust your volume

- Be sure your computer's sound is turned on as well.
- Click this blue button. Slide the control to the left or right to fit your needs.

Ask your questions

- Feel free to submit content related questions to the speaker by clicking this red button.
- Someone is available to assist with your technology and CPE related questions as well.

Download your materials

- Access today's slides and learning materials by clicking this green 'Resources' button at any time during this presentation
- If you need help accessing these materials send a message through the Q&A application

About the PFP Section & PFS Credential

- The AICPA Personal Financial Planning (PFP) Section is the premier provider of information, tools, advocacy and guidance for CPAs who specialize in providing estate, tax, retirement, risk management and/or investment planning advice to individuals, families and business owners. (Learn more at aicpa.org/PFP.)

- The Personal Financial Specialist (PFS) program allows CPAs to gain and demonstrate competence and confidence in providing estate, tax, retirement, risk management and/or investment planning advice to individuals, families and business owners through experience, education, examination, and a resulting credential. (Learn more at aicpa.org/PFS.)

Today's Speakers

Michael Goodman, CPA/PFS (Moderator)

Wealthstream Advisors

Mark Astrinos, CPA/PFS

Vista Wealth Management

David Oransky, CPA/PFS

Laminar Wealth

CPAs Are…


CPAs are
TRUSTED
KNOWLEDGEABLE
Strategic
LEADERS AND COMPETENT
PROBLEM SOLVERS
ANALYTICAL
OBJECTIVE OBJECTIVE OBJECTIVE
QUALITY DRIVEN
CPA
America Counts on CPAs®
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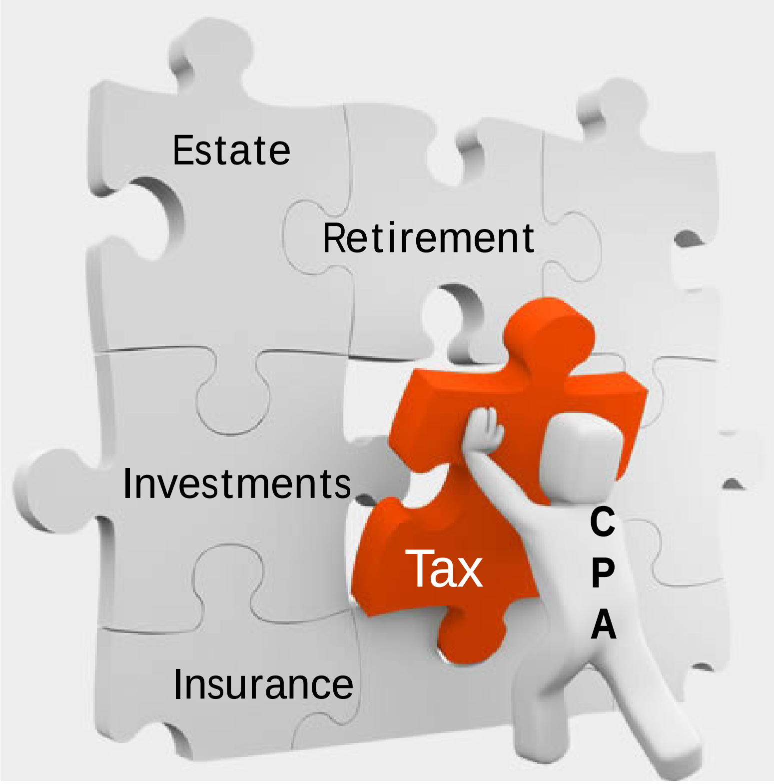
A CPA Financial Planner is…



Visit aicpa.org/cpafinancialplanner

Growing demand for personal financial planning services

10,000
Baby Boomers per day will turn 65 for the next 17 years
(2010 Pew Research Study)

Increasing tax complexities

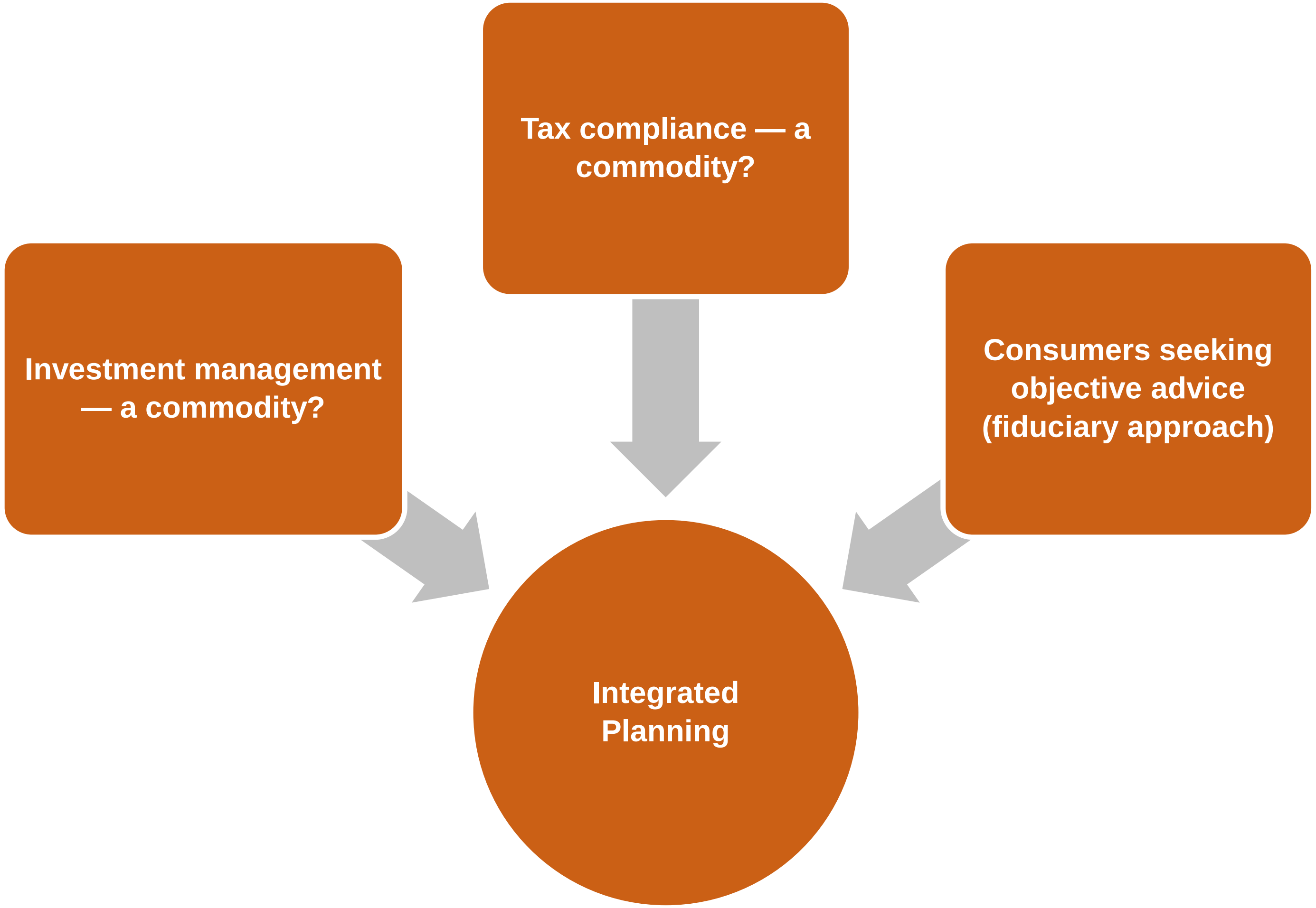
Core areas of PFP all identified as high growth niche services
(Accounting Today Top 100 firms, 2015)

$30 trillion
wealth transfer over next 30-40 years
(FTI Consulting 2010)

PFP projected to grow
2x faster
than A&A and tax
(IBIS World 2015)

27% growth
in need for advisors
(U.S. Bureau of Labor Statistics)

Trends


Tax compliance — a commodity?
Investment management — a commodity?
Consumers seeking objective advice (fiduciary approach)
Integrated Planning

Success Tips

Bolster Your Confidence

Knowledge

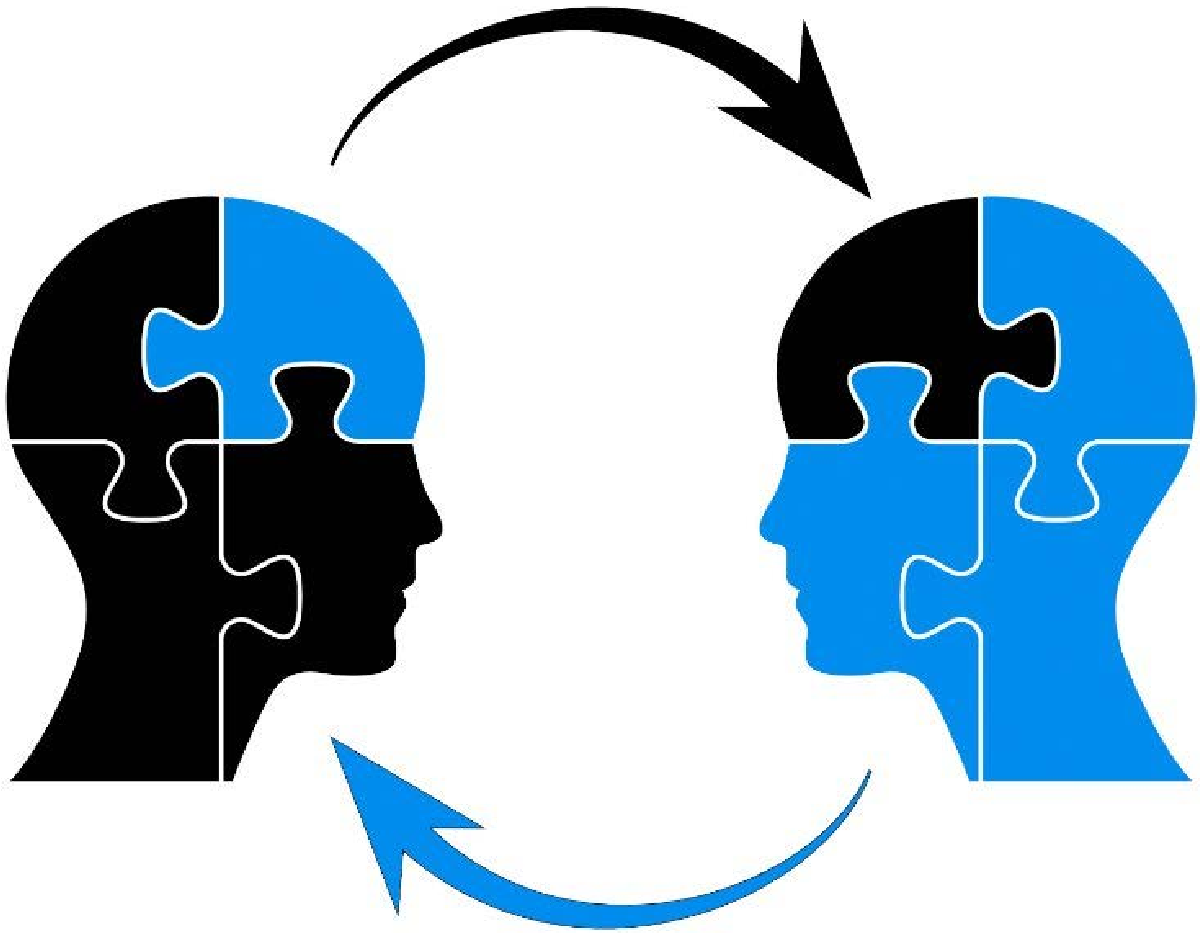
See Your Youth as an Advantage

- **And why you don’t have to serve only young clients**

Grow Yourself & Evolve Your Business

- Lifelong learning
- Networking
- Open communication

Find a Mentor & Pay it Forward



Questions?

AICPA PFP Section Member Resources

PFP Section members, inclusive of CPA/PFS credential holders, have access to resources on the latest planning strategies and trends in personal financial planning services so that they can practice competently and profitably. Visit aicpa.org/pfp/resources.

Estate

Tax

Retirement

Investment

Insurance & Risk Management

Practice Management

Legislative/ Regulatory

Professional Responsibilities

Consumer Content

Upcoming PFP Section Events

- **Webcasts (4 free events per year with CPE for PFP/PFS members)**

February 27 1-2:45pm ET	**Protecting Your Clients from Financial Fraud and Abuse**
April 26 1-2:15pm ET	**Advising Clients on Planning for Education**
May 16 1-2:15pm ET	**Life Insurance Policy Reviews: What CPAs Need to Know When Serving Individuals**
May 24 1-2:45pm ET	**Proactive Planning: Post Tax-Season**

- **Conferences**

January 22-25, 2017	AICPA Personal Financial Planning Leadership Summit
June 12-14, 2017	AICPA Advanced PFP Conference (ENGAGE)

- **For the full calendar of upcoming PFP Section events, visit aicpa.org/pfp/events.**
- **PFP/PFS Members can access the archives (no CPE) for free at aicpa.org/pfp/library.**

CPA/PFS News and Events

PFS Referral Program

- Receive 100% credit to apply toward future CPA/PFS dues by referring a CPA to become a PFS or sit for the PFS exam

PFS Exam

- Register now for upcoming exam windows
- Discounts, sponsorships and volume pricing available

Education Opportunities

- In-depth courses in estate, retirement, tax, investments, insurance, and PFP process
- In-person and online PFP Boot Camp
- Self-study PFS exam review course

Learn more at aicpa.org/pfp/pfs

A CPA Financial Planner is a trusted advisor who…

- Operates at the highest professional level when delivering PFP services to clients, acting in the clients' best interest.
- Adheres to high standards as required by the Code of Professional Conduct and the Statement on Standards in PFP Services through the application of objectivity, integrity, due care and competence required by CPAs.
- Is regulated by state boards of accountancy.
- Integrates advanced planning concepts, including tax and business considerations, with the entire financial plan.