**AICPA Media Relations Report**
**Personal Financial Planning/PFS Support**
**October 2009**

The following is a summary of the AICPA Media Relations team's activities on behalf of the PFP section and PFS credential during October 2009. AICPA Media Relations arranged 32 interviews for PFS spokespeople with print and broadcast media, including Smartmoney.com and Fidelity.com. The total number of media impressions is 8,125,930.

## I. Estate Planning Week

In connection with Estate Planning Week, on Oct. 21, the AICPA coordinated a satellite media tour. Susan Bruno, Ted Sarenski and Marty Shenkman served as spokespersons.

Questions covered the basics of financial planning. Marty, Susan and Ted included the importance of estate planning into a person's basic financial planning needs. They completed 15 interviews. A detailed list is below.

Marty, Susan and Ted did interviews with the below stations.

**Radio:**

KXL-AM, Portland, OR (9,300 listeners)
WFLA-AM, Tampa Bay (22,900 listeners)
Arkansas News Network, Little Rock (38,800 listeners)
WHYN-AM, Springfield, MA (4,300)
KFNN-AM, Phoenix (2,000 listeners)
KXKL-AM, Denver (14,400 listeners)
KTAR-AM, Phoenix (15,100 listeners)

**TV:**

KRIV-Fox, Houston (29,001 viewers)
WGHP-Fox, Greensboro, N.C. (58,230 viewers)
KUSA-NBC, Denver (67,496 viewers)
WXMI-Fox, Grand Rapids, MI (1,894 viewers)
KTBC-Fox, Austin (14,811 viewers)
XETV, Fox, San Diego (18,380 viewers)
KCTU-Ind., Wichita (audience N/A)
KCPQ-Fox, Seattle (50,544 viewers)

**Additional interviews:**

Oct. 19
Rob Krueger, CPA/PFS, did an in-studio interview with WTTG-Fox, Washington, D.C. (audience, 76,802 viewers)

Oct. 26
Ted Sarenski did a telephone interview with WLW-AM, Cincinnati
(24,800 listeners)

Oct. 27
Ted Sarenski did a telephone interview with WALR-FM, Atlanta
(28,800 listeners)

Oct. 29
Rob Krueger did an in-studio interview with News Channel 8, Washington, D.C.
(3009 viewers)

Nov. 13
Rob Krueger will do an in-studio interview with WUSA-CBS, Washington, D.C.
(43,539 viewers)

Oct. 23, Ted Sarenski did an online reader chat with USAToday.com on Estate Planning. Ted answered 27 questions. The below article identifies Ted as a CPA / personal financial specialist.

## II. PFS Member Interviews

- WLW-AM, Cincinnati (24,800 listeners)
  Oct. 14
  Mackey McNeill did an interview on what couples need to discuss when making investment choices (live). She was identified as a CPA/PFS.
  Interview arranged by PR Consulting Group

- St. Louis Post Dispatch (audience: 238,400)
  Oct. 20
  Mackey McNeill spoke about why people shouldn't make hardship withdrawals from their IRA or 401(l) plans.
  Interview arranged by PR Consulting Group

- Newsday (audience: 368,194, unique online monthly visitors: 2,301,250)
  Oct. 21
  Justine Weisser discussed what people need to be aware of, if they are considering selling their life insurance policies to generate cash.
  Interview arranged by PR Consulting Group

- Fidelity.com (audience, 5,116,431 unique online monthly visitors)
  Oct. 22
  Lisa Featherngill spoke about what financial implications people face, if they voluntarily leave the workforce or are laid off.

- Smartmoney.com (audience: 1,589,057 unique online monthly visitors)
  Oct. 22
  Mackey McNeill spoke about how to have a good holiday season without falling into debt.

- thefastertimes.com (unique monthly online visitors: 427,920)
  Oct. 26
  Lisa Featherngill, Beth Gamel and Steven Levey submitted tips on how people can save money in the supermarket, beyond clipping coupons. Beth Gamel was identified as a CPA / personal financial specialist.

- Miami Herald (audience: 202,122 unique online monthly visitors: 1,900,000)
  Oct. 27
  Susan Bruno spoke about what people need to consider if they are thinking about selling their life insurance policy to generate cash.
  Interview arranged by PR Consulting Group

- WLRN-FM, NPR, Miami (381,000 listeners)
  Oct. 27
  Susan Bruno spoke about what people need to consider if they are thinking about selling their life insurance policy to generate cash (taped).
  Interview arranged by PR Consulting Group

- WNBC-Hartford (viewership: 78,000)
  Oct. 27
  Alan Rothstein discussed how people can relieve themselves of debt (taped).

- Smartmoney.com (audience: 1,589,057 unique online monthly visitors)
  Oct. 27
  Lisa Featherngill and Marty Shenkman commented on what wealthy people need to be aware of as a result of the IRS' newly formed Global High Wealth Industry Group. Lisa was identified as a CPA and a financial planner.

- WUSA-TV-CBS, Washington, D.C. (viewership: 43,539)
  Oct. 30
  Rob Krueger discussed how people can protect their credit (live).
  Interview arranged by PR Consulting Group

## III. Articles

Below are articles that appeared during the month of October, quoting CPA/PFS credential holders and / or mentioning the PFS credential.

- Oct. 29, thefastertimes.com
  How to Slash Your Supermarket Spending - Thefastertimes.com
  14,264 impressions
  Beth Gamel was identified as a CPA / personal financial specialist

- Oct. 27, Smartmoney.com
  Is the New IRS Wealth Squad Coming for You?
  52,969 impressions
  Lisa Featherngill was identified as a CPA and a financial planner

- Oct. 24, the Valley News
  Only one candidate fits the Bill
  24,315 impressions
  Doug Hoffman was identified as a personal financial specialist

- Oct. 23, USA Today / USAtoday.com
  5 myths about wills, and what you should do
  6,656,834 impressions
  Ted Sarenski was identified as a CPA / personal financial specialist

- Oct. 18, baltimoresun.com
  Personal finance - Roth IRAs open to wealthier Americans in 2010
  48,617 impressions
  Lyle Benson was identified as a CPA / personal financial specialist

- Oct. 18, Morningstar.com (Chicago, IL)
  How to Pick a Financial Advisor
  19,406
  PFS credential mentioned

- Oct. 16, accountingweb.com
  AICPA experts find exceptional opportunities for estate plans in 2009
  (AICPA PFP and NAPEC Estate Planning Webinar was covered)
  1,821 impressions

- Oct. 4, Investment Weekly (also covered by Business & Finance Week, Investment Weekly News, Marketing Business Weekly, Mergers & Acquisitions Business, Real Estate & Investment Business and Real Estate & Investment Week)
  End of Life is an Important Element of All Financial Plans: AICPA Guide
  840,000 impressions
  Ted Sarenski was identified as a CPA/PFS