

Personal Financial Specialist Exam Sponsorship Reimbursement Program Application

Deadline: Applications must be sent before the exam is taken. Applications must be emailed, faxed, or postmarked no later than the day the applicable exam window begins.

Sponsorship Overview: The AICPA Personal Financial Specialist (PFS) Exam Sponsorship Reimbursement Program is funded by the Association of CPA Financial Planners (ACPAFP). The ACPAFP is a non-profit entity which has worked alongside the AICPA to help ensure the success of the CPA/PFS credential. The CPA/PFS Sponsorship program provides awards to PFS exam candidates who are pursuing the CPA/PFS credential to help offset the cost of the program. These awards are intended to encourage CPAs who have an interest in personal financial planning to complete the credential's exam requirement and ultimately obtain the CPA/PFS credential. Only one sponsorship payment will be made per person.

Amount: The sponsorship is designed to reimburse expenses incurred to prepare and sit for the PFS Exam. The amount of the sponsorship is dependent on the type of exam review option purchased: self-study, web class, and/or in-person class.

Deadline: Applications must be postmarked no later than the day the applicable exam window begins.

Payment: The applicant should pay the registration fees for the review course, class and exam at the time of purchase. Applicants will be notified of their approval within seven business days of receipt of your application. After the end of the applicable PFS exam window, completion of the requirements will be verified and the sponsorship reimbursement paid. Payment is conditional upon completing, not passing, the PFS Exam. Payments for the Level 3 \$600 Sponsorship will require a W-9 and will be reported to the IRS as taxable income.

Applying for: (initial the line that applies)

Level 1 - \$200 Sponsorship

Required:

- Self-study PFS Exam Review Course
- PFS Exam

Level 2 - \$400 Sponsorship

Required:

- Self-study PFS Exam Review Course
- An online review class or archived recording (if offered)
- PFS Exam

Level 3 - \$600 Sponsorship

Required:

- Self-study PFS Exam Review Course
- In Person PFP Boot Camp class
- PFS Exam

Member name: _____ **AICPA Member #:** _____

Firm Name: _____

Mailing Address (for payment):

Street: _____

City, State, Zip: _____

Phone: _____

Email Address: _____

Eligibility Requirements: Eligible applicants must satisfy all of the prerequisites listed below before payment will be made:

Please initial next to each requirement for the particular sponsorship you desire, verifying that you meet the requirement.	PFS Exam Sponsorship		
	Level 1 \$200	Level 2 \$400	Level 3 \$600
1. I am a US citizen or a permanent resident (green-card holder).			
2. I hold an active, unrevoked and valid CPA license, permit, or certificate.			
3. I am an AICPA member in good standing.			
4. I am a PFP Section member.			
5. I anticipate meeting the CPA/PFS credential's experience requirement <u>within 6 months of completing the exam.</u> <i>(At least 3,000 hours of PFP experience within the five years preceding the date of the PFS application. Note that up to 1,000 hours of tax compliance experience can count toward the total experience requirement.)</i>			
6. I anticipate meeting the CPA/PFS credential's education requirement <u>within 6 months of completing the exam.</u> <i>(At least 75 hours of PFP-specific CPE within the five years preceding the date of the PFS application. Note that the PFS Exam Review Course contains 32.5 CPE hours and the Review Class contains 21 CPE hours.)</i>			
7. I have or will purchase the self-study PFS Exam Review Course .			
8. I have or will purchase an online PFS exam review class or archive. *	X		X
9. I have or will purchase the in-person PFP Boot Camp . *	X	X	
10. I will complete the PFS Exam .			

* Note that while the PFS Exam Review Course is highly recommended as a prerequisite for the online review options and the in-person PFP Boot Camp class, it is a requirement for purposes of receiving the sponsorship payment.

Affirmation:

I affirm that the statements given in this application are true and complete to the best of my knowledge and I am submitting this application prior to taking the PFS Exam.

Signature: _____ Date: _____

Return this application to the AICPA for processing:

- Email to: financialplanning@aicpa.org (preferred submission method)
- Fax to: 800-362-5066
- Mail to: AICPA
220 Leigh Farm Rd
Durham, NC 27707
Attn: PFP Division, Dan Snyder

(Please contact us at financialplanning@aicpa.org if an approval email is not received within 7 business days.)

Questions? Please contact the AICPA at financialplanning@aicpa.org or calling **866-835-2938**