

A CAREER AS A CPA FINANCIAL PLANNER CAN REALLY TAKE YOU PLACES.



IS A CAREER IN PERSONAL FINANCIAL PLANNING RIGHT FOR YOU?

Does this describe you?

- Good with numbers and analysis?
- Enjoy interacting with people?
- Want to have a positive impact on others?
- Want a career that's both personally and professionally rewarding, intellectually challenging, well-respected by the CPA profession and provides work/life balance?



WHY FINANCIAL PLANNING?

FPF is projected to grow
2X FASTER
than the overall accounting profession.

IBIS World 2014



27%
Projected growth rate
of demand for advisers
through 2022.

U.S. Bureau of Labor Statistics

\$30 TRILLION WILL BE TRANSFERRED FROM ONE GENERATION TO THE NEXT IN THE COMING DECADES

With this great transfer of wealth comes the need for planning: tax, estate, retirement, risk management and investments. CPA financial planners can cut through the complexities, which will have a positive impact on the people receiving the transfer and can lead to new revenues streams for the practice.



WHERE CAN CPA FINANCIAL PLANNERS WORK?

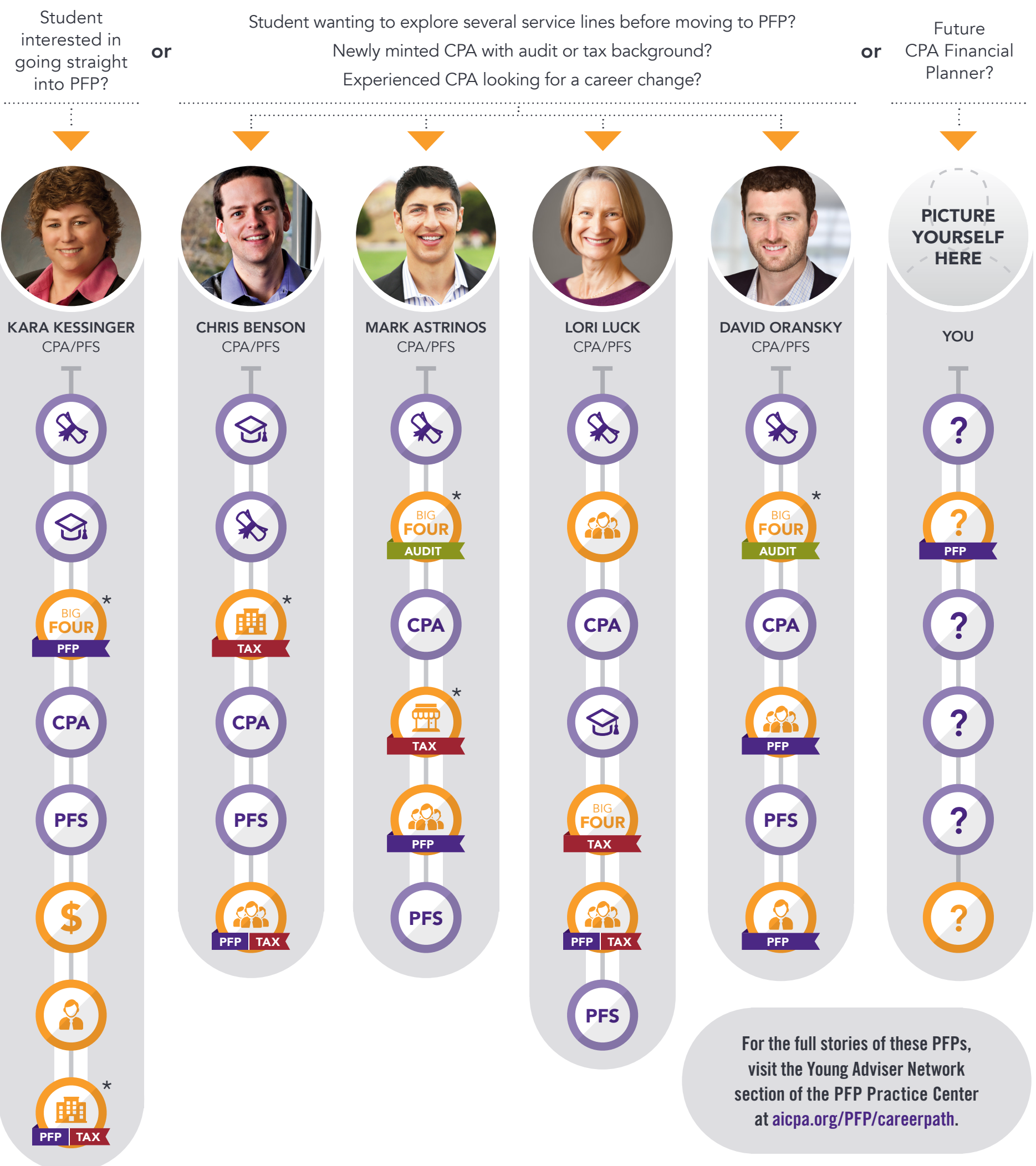


- CPA firms offering both financial planning and traditional CPA services
- CPA firms with separately owned, registered investment advisory (RIA/wealth management firm)
- CPA firms affiliated with RIA or dealer-broker
- Financial planning/wealth management firms
- Family office
- Bank or wire house
- Law firms



WHAT WILL BE YOUR PATH TO BECOMING A CPA PERSONAL FINANCIAL PLANNER?

Are you a:



EDUCATION/CREDENTIAL MILESTONES

- Bachelor of accounting
- Master of accounting, taxation or PFP
- Certified Public Accountant (CPA)
- Personal Financial Specialist (PFS™) credential

EMPLOYMENT MILESTONES

- Solo firm
- Small firm/RIA
- Regional firm
- National firm
- Big Four accounting firm
- Bank



*These CPA firms also offer traditional public accounting services (e.g., audit, tax, etc.); the ribbon indicates the service line where this CPA practices or practiced.

WHAT WILL YOUR PATH TO PFP LOOK LIKE?

Explore your possibilities today at aicpa.org/PFP/careerpath.

For more information, visit aicpa.org/PFP.

Note: State boards of accountancy require specific education and experience requirements to become a CPA. Check with your state board or look up the latest requirements at ThisWaytoCPA.com.