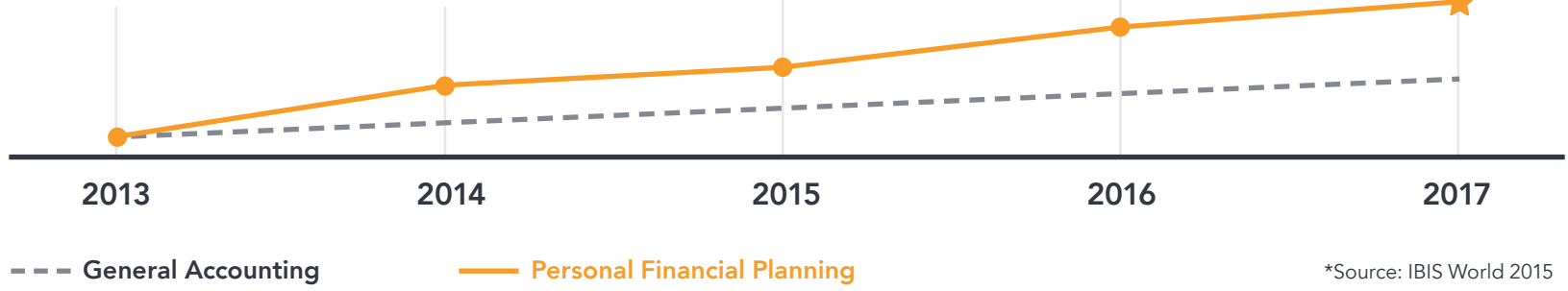


TAKE YOUR CAREER TO THE NEXT LEVEL BY ADDING THREE SIMPLE LETTERS:



THE DEMAND IS ALREADY HIGH. AND GROWING!

The demand for personal financial planning services is **GROWING 2 TIMES FASTER** than that of general accounting through 2017.*



*Source: IBIS World 2015



WHY ADD THE PERSONAL FINANCIAL SPECIALIST (PFS) CREDENTIAL TO YOUR CPA?

63% OF CPAs believe that AICPA advisory service credentials have increased their credibility.*



Essential competency in core financial planning areas puts **your career** on the fast track to increased compensation.

*Source: 2013 AICPA Compensation Study



WHY GET THE PFS CREDENTIAL?

Being a CPA/PFS tells your clients you:



Represent a 125-year-old established, trusted and regulated profession



Are distinguished from other financial planners through your training, experience, testing and education as a CPA



Are competent and confident in the subject matter and are committed to continued learning in personal financial planning



Have demonstrated your expertise in the specialized topic of personal financial planning (PFP): estate, retirement, investment, risk management/insurance and tax planning



Have had your expertise backed by the world's largest member association representing the accounting profession — the AICPA



Have access to a community of like-minded professionals and the latest tools, resources and learning opportunities — and more — to be successful

THE PATHWAY TO THE CREDENTIAL: CPA PFS Personal Financial Specialist™

1 LEARN

The AICPA offers three exam preparation options

SELF-STUDY ONLINE

The PFP Boot Camp self-study online course allows you to study at your own pace, on your own time.

23.5 CPE CREDITS

IN-PERSON GROUP STUDY

A 2½-day PFP Boot Camp is offered twice a year for your convenience

24 CPE CREDITS

VIDEO WEBCAST

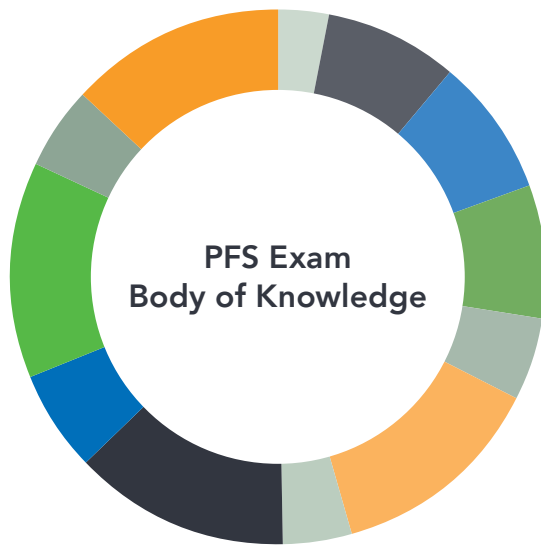
An online broadcast of the PFP Boot Camp is offered twice a year

22 CPE CREDITS

To get credentialed, a CPA/PFS candidate **must earn 75 hours** of personal financial planning (PFP) education CPE (not required to sit for the exam) within the five-year period preceding the date of PFS application.

2 PASS THE EXAM

- 11–14% Estate Planning
- 4–6% Charitable Planning
- 11–14% Retirement and Financial Independence Planning
- 5–7% Elder, Special Needs, Chronic Illness Planning
- 11–14% Investment Planning
- 3–5% Education Planning



- 11–14% Risk Management Planning
- 4–6% Employee and Business-Owner Planning
- 7–11% Personal Financial Planning Process
- 7–11% Professional Responsibilities and the Legislative and Regulatory Environment
- 7–11% Fundamental Financial Planning Concepts
- 2–4% Special Situations

Note: Emphasis is on the planning process and the inter-connectedness of all areas, with taxation and income tax planning integrated throughout

3 GAIN EXPERIENCE

A CPA/PFS candidate must meet the following business experience requirements within the five-year period preceding the date of the PFS credential application:

- 2 years of full-time experience** (or 3,000 hours equivalent) in personal financial planning.
- Up to 1,000 hours of tax compliance experience** can count toward the total experience requirement. For candidates in academia, a qualified credential holder should be a full-time professor and have taught at least four accredited college courses with 50% of their material included in the CPA/PFS Body of Knowledge.



4 GET CREDENTIALLED

Initial certification requirements



Regular **AICPA membership** in good standing



Valid, active and unrevoked **CPA permit, license or certificate** issued by a legally constituted state authority



Completed **PFS application** indicating fulfillment of all requirements, including education, experience and exam

LEARN MORE! VISIT AICPA.ORG/PFS TO FIND OUT MORE ABOUT THE PFS CREDENTIAL