

Year in Review



PFP Section

Tax. Retirement. Estate. Risk management. Investments.

Dear Member,

It is our pleasure to serve CPAs and professionals who provide tax, retirement, estate, risk management and investment services. Looking back, 2017 was a monumental year that brought **change, innovation** and **new opportunities** for professionals offering these financial planning services.

As you know, the PFP Division exists to support CPAs and professionals to provide services to individual, family and business-owner clients in a **cutting-edge, relevant** and **integrated** way that clients today (and in the future) expect. Over the past year, the AICPA staff and member volunteers have collaborated on an integrated strategy to bring the importance of the changing financial planning and tax professional landscape and the future needs of these clients to leadership across the AICPA, including the AICPA Board of Directors and Governing Council.

We look forward to building on this momentum to best support members for your long-term success. It is our mission now and every year to **broaden your competency** by providing you with **timely information, learning and resources on developments** in the profession and **tools** to assist you with your **practice and revenue growth**.

Top 10 Efforts for YOU in 2017: A Year in Review

1. **Staff & Volunteer Leadership Focus on the Future of Services to Individual Clients**
2. **New Essentials of Personal Financial Planning textbook and model curriculum** to help [prepare accounting students](#) with the knowledge and resources on personal financial planning during their academic experience

3. **New Certificate Pathway** launched to allow individuals to complete [education](#) in a topical format designed so that professionals can learn and earn the PFS credential in a more flexible way
4. **New Body of Knowledge** [arranged according to the planning process](#) within the disciplines of financial planning while integrating tax planning within each area
5. **New Topical Learning** (including [succession planning](#), [education planning](#) and [tax reform](#))
6. **Inaugural Personal Financial Planning Summit**, an intimate gathering designed for forward-thinking financial planners to learn from leaders in the profession and participate in roundtable discussions and networking activities
7. **30th Anniversary of PFS Credential** celebration commemorating [what it means to be a PFS](#) equipped to deliver specific experience and advice to individual clients
8. **Advocacy** on your behalf to protect [your best interest](#) and the public's on legislative/regulatory topics relevant to you
9. **Learning Opportunities** which include webcasts and podcasts in our [learning library](#) and, for attendees, sessions from the 2017 [Advanced Personal Financial Planning Conference](#)
10. **Continued Delivery of Key Resources** like [Broadridge Advisor](#), [PFP News](#), [Bob Veres Inside Information](#) subscription and [updated technical and practice guides](#)

2017 Award Recipients

Distinguished Service Award - Scott Sprinkle, CPA/PFS

P. Thomas Austin PFP Division Scholarship - Shane Mason, CPA/PFS

PFP Standing Ovation Award - [16 young CPA/PFS recipients](#) recognized for their contribution to the CPA financial planning profession. [Submit nominations for 2018](#).

For a comprehensive list of the many benefits you receive as a PFP/PFS member, please visit our website at aicpa.org/pfp/benefits and check out [this page](#) for overview videos. The most effective way to stay updated is our weekly [newsletter](#) (delivered to your inbox on Wednesdays) which summarizes and compiles the most relevant news, member benefits, resources and learning opportunities.

Without the help of our hard-working committee members, task force volunteers and subject matter experts, none of this would be possible. We are eternally grateful for their contribution to you and to the profession at large.

Edmund Hillary once said, "People do not decide to become extraordinary; they decide to accomplish extraordinary things." In 2018, we will aim to equip you to achieve extraordinary things and deliver exceptional service to your clients. We look forward to serving you and again, thank you for your dedicated membership.

Please note: our team does not receive replies to this email. Please use the links below to contact us directly with any questions, comments or feedback.

Best Regards,

The AICPA PFP Team

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