Dear PFP Section Members and PFS Credential Holders,

It is our pleasure to serve CPAs and professionals providing financial planning services each and every year. Looking back, 2016 was a phenomenal year that brought change, innovation and new opportunities for professionals offering financial planning services. It is our mission to ***broaden your competency*** by providing you with ***timely information on developments*** in the profession and ***tools*** to assist you with your ***practice and revenue growth.***

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.

**Top 10 Efforts for YOU in 2016: A Year in Review**

1. **Learning Opportunities** which include webcasts and podcasts in our learning library and, for attendees, sessions from the 2016 Advanced Personal Financial Planning Conference
2. **Updated Technical Guides** on topics like retirement planning, Social Security, financial and estate planning, and financing retirement healthcare
3. **Building the University Pipeline** to prepare accounting students with the knowledge and resources on personal financial planning and career pathway during their academic experience
4. **New Elder Planning Resources** to help you address the growing demand for services to those going through complicated transitions as a part of the aging process
5. **A soon to be announced updated PFP Body of Knowledge** which emphasizes the importance of the planning process within each discipline area of financial planning, the integration of all areas and on the relevant tax ramifications
6. **DOL Resources** to help you prepare for the upcoming changes and practice requirements applicable to delivering retirement advice
7. **Advocacy** on your behalf to protect your best interest and the public's on hot legislative topics that matter to you most
8. **New Toolkits** on hot topics like estate valuation regulations & estate basis consistency and revamping the proactive planning toolkit
9. **CPA Financial Planner** awareness campaign and resources to help equip you to connect with consumers seeking your services
10. **Continued Delivery of Key Resources** like Forefield Advisor and Bob Veres subscriptions (annual value of $798)

Karen Goodfriend, CPA/PFS, founder and managing principal of Wealth Values, has been a long-standing member and has a few things to share about her experience in 2016. *"I consider the guides, webinars and resources to be a go-to place to get started and stay updated on a topic. I've been able to "wow" clients and go beyond their expectations with strategies and knowledge I have taken from these tools. Overall, the combination of the resources, conference and network of other PFP members results in a ton of resources to draw upon thanks to my membership and being active in the PFP community.*"

**2016 Award Recipients**

**Lifetime Achievement Award –** James Shambo, CPA/PFS
**Distinguished Service Award –** Sid Kess, CPA, J.D., LL.M.
**P. Thomas Austin PFP Division Scholarship –** Ross Riskin, CPA/PFS
**PFP Standing Ovation Award –** 22 young CPA/PFS recipients recognized for their contribution to the CPA financial planning profession. Submit nominations for 2017.

**Top 10 Things to Look Forward to in 2017: Better than Ever**

1. **PFP Summit** in January
2. **PFS Exam Enhancements**
3. **ENGAGE –** a new, 5-in-1 conference experience
4. **Improved Broadridge (formerly Forefield) Platform**
5. **New Learning Opportunities** through webcasts, podcasts, articles, whitepapers and blog posts
6. **University PFP Program** to launch with *Essentials in Personal Financial Planning* course and Model PFP Curriculum
7. **New Elder Planning Guide**
8. **New PFP Boot Camp aligned to revamped PFP Body of Knowledge**
9. **30th Anniversary Celebration for the PFS Credential**
10. **Continued Delivery of Key Resources** like Forefield Advisor, PFP News, updated guides, toolkits, Bob Veres subscriptions and advocacy

For a comprehensive list of the many benefits you receive as a PFP/PFS member, please visit our website at aicpa.org/pfp/benefits. Each week, our section produces a weekly newsletter (delivered to your inbox on Wednesdays) which summarizes and compiles the most relevant member benefits, resources and learning opportunities. This publication is the most effective way to stay updated on personal financial planning news.

Albert Einstein once said, “Once we accept our limits, we go beyond them.” In 2017, we will aim to take you beyond the status quo. We look forward to serving you and again, thank you for your dedicated membership.

Best Regards,

The AICPA PFP Team

Andrea Millar, CPA/PFS, Associate Director
Dan Snyder, CPA/PFS, ChFC, Senior Technical Manager
Sarah Bradley, CPA, Senior Technical Manager
Sandra Truitt, CFP®, CRC®, Lead Technical Manager
Maritza Cora, Manager