AICPA® Personal Financial Planning Section

How to Use Forefield Advisor In Your PFP Practice

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Today's Agenda

- PFP Division Update
- Forefield Advisor Demo

PFP Division Update

Forefield Advisor Demo

- **A live demonstration of Forefield Advisor features coupled with practical ideas from practitioners on how it can be used in your practice.**
- **Panelists:**
  - John Bracco, Broadridge
  - Susan Bruno, CPA/PFS, Beacon Wealth Consulting LLC
  - Deborah Fox, Fox Financial Planning Network
- **Please submit questions for the panel throughout the discussion.**

PFP Section Resources (aicpa.org/PFP)

- **Planning After ATRA and Net Investment Income Tax Toolkit (aicpa.org/pfp/proactiveplanning)**
- **Forefield Advisor (aicpa.org/pfp/forefield)**
- ***The CPA's Guide to Financial & Estate Planning*– Volumes 1-4**
- **Practice Management Section under Resources**
  - **PFP Practice Center (aicpa.org/pfp/practicecenter)**
- **Fox Financial Planning Network (aicpa.org/pfp/ffpn)**
  - Customized version of FFPN specifically for CPA financial planners who want to formalize PFP services with deeply discounted pricing not available to the public
- **AICPA Advanced Personal Financial Planning Conference (cpa2biz.com/PFP) – January 20-22, 2014 in Las Vegas**
  - 2-day session (Jan 18-19) for those in earlier stages of PFP
    - Implementing PFP Services: Step by Step Plans for Success
- **For the full calendar of upcoming PFP Section events, visit www.aicpa.org/PFP and click on CPE & Events.**

Questions?

If you have any questions for the PFP Division staff, contact us at financialplanning@aicpa.org.