



Take your career to the next level by adding three simple letters: PFS

The demand is already high. And growing!

The U.S. Bureau of Labor Statistics projects a 27% growth in the need for personal financial advisers over the next six years and 30% over the next 10.



Why add the Personal Financial Specialist (PFS) credential to your CPA?



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

*Source: 2013 AICPA Compensation Study



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

Why get the PFS credential?

It 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): tax, retirement, estate, risk management and investment planning



Have 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



Step 1: Learn.

The AICPA offers a complete curriculum of education and three exam preparation options



PFP online education

An online CPE learning curriculum covering the entire body of knowledge allows you to dive deeper where you need to.

Up to 90 CPE credits



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

The PFS credential certificate pathway combines the online education with five certificate exams to meet the education and exam options while allowing the candidate to conveniently fit both into their schedule.

To get credentialed, a 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.

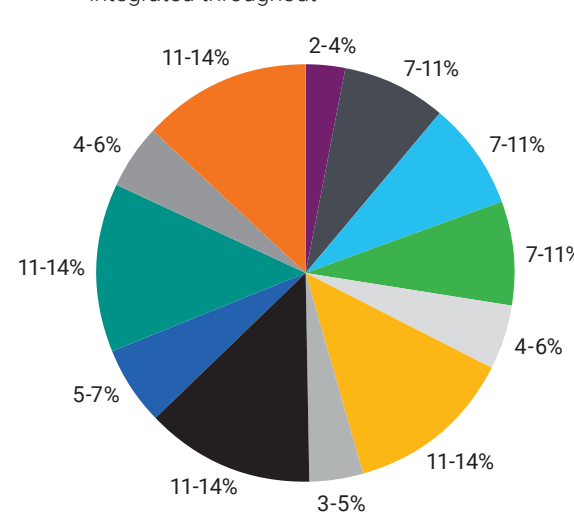
Step 2: Pass the exam.

- Estate planning
- Charitable planning
- Retirement and financial independence planning
- Elder, special needs, chronic illness planning
- Investment planning
- Education planning

Note: Emphasis is on the planning process and the interconnectedness of all areas

PFS Exam body of knowledge

Taxation and income tax planning integrated throughout



Choose from two exam options:
 - 5-hour comprehensive exam, or
 - Five individual certificate courses and exams

Step 3: Gain experience.

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



Two 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 PFS Body of Knowledge.

Step 4: Get credentialed.

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.