



Personal Financial Specialist Exam Sponsorship Reimbursement Program Application

(applies to the Standard Exam Pathway, not the Certificate Exam Pathway)

Deadline: Applications must be sent before the exam is taken. Applications must be emailed, faxed, or postmarked no later than the day the applicable exam window begins.

Sponsorship Overview: The AICPA Personal Financial Specialist (PFS) Exam Sponsorship Reimbursement Program provides awards to PFS exam candidates who are pursuing the CPA/PFS credential to help offset the cost of the program. These awards are intended to encourage experienced CPAs who have an interest in personal financial planning to complete the credential's exam requirement (using the comprehensive exam; does not apply to the certificate exam pathway) and ultimately obtain the CPA/PFS credential. Only one sponsorship payment will be made per person.

<p>Applying for: (initial the line that applies)</p> <p>_____ Level 1 - \$200 Sponsorship</p> <p>Required:</p> <ul style="list-style-type: none"> - PFP Boot Camp <ul style="list-style-type: none"> Either web-based class or online CPE course - PFS Exam <p>_____ Level 2 - \$600 Sponsorship</p> <p>Required:</p> <ul style="list-style-type: none"> - PFP Boot Camp – in-person class - PFS Exam

Amount: The sponsorship is designed to reimburse expenses incurred to prepare and sit for the comprehensive PFS Exam. The amount of the sponsorship is dependent on the type of exam PFP Boot Camp option purchased: on-demand, web class, and/or in-person class.

Payment: The applicant should pay the registration fees for the PFP Boot Camp course or class and PFS exam at the time of purchase. They will be notified of their approval within seven business days of receipt of your application. After the end of the applicable PFS exam window, completion of the requirements will be verified and the sponsorship reimbursement paid in the form of a debit card mailed to your AICPA profile address. Payment is conditional upon completing, not passing, the PFS Exam.

Member name: _____ **AICPA Member #:** _____

Firm Name: _____

Mailing Address (for payment):

Street: _____

City, State, _____

Zip: Phone: _____

Email Address: _____

Eligibility Requirements: Eligible applicants must satisfy all of the prerequisites listed below before payment will be made:

Please initial next to each requirement for the level of sponsorship desired, verifying you meet the requirement.	PFS Exam Sponsorship	
	Level 1 \$200	Level 2 \$600
1. I am a US citizen or a permanent resident (green-card holder).		
2. I hold an active, unrevoked and valid CPA license, permit, or certificate.		
3. I am an AICPA member in good standing.		
4. I am a PFP Section member.		
5. I anticipate meeting the CPA/PFS credential's experience requirement <u>within 6 months of completing the exam.</u> <i>(At least 3,000 hours of PFP experience within the five years preceding the date of the PFS application. Note that up to 1,000 hours of tax compliance experience can count toward the total experience requirement.)</i>		
6. I anticipate meeting the CPA/PFS credential's education requirement <u>within 6 months of completing the exam.</u> <i>(At least 75 hours of PFP-specific CPE within the five years preceding the date of the PFS application.)</i>		
7. I have or will purchase either the on-demand CPE or web-based class of the PFP Boot Camp.		X
8. I have or will purchase the in-person PFP Boot Camp.	X	
9. I will complete the PFS Exam .		

Affirmation:

I affirm that the statements given in this application are true and complete to the best of my knowledge and I am submitting this application prior to taking the comprehensive PFS exam.

Signature: _____ Date: _____

Return this application to the AICPA for processing:

- Email to: financialplanning@aicpa.org (preferred submission method)
- Fax to: 800-362-5066
- Mail to: AICPA
220 Leigh Farm Rd
Durham, NC 27707
Attn: Member Service

(Please contact us at financialplanning@aicpa.org if an approval email is not received within 7 business days.)

Questions? Please contact the AICPA at financialplanning@aicpa.org or calling 866-835-2938