



Get the most out of your PFP Section.

Get connected to maximize your value.

- Bookmark the PFP homepage (aicpa.org/pfp) to go directly to your benefits.
- Add aicpapfp@e2.aicpa.org to your safe-sender list and read your weekly PFP News.
- Search for "AICPA PFP" on your favorite podcast app (such as [Pod-o-Matic](#) or [iTunes](#)) to subscribe to the podcast channel.
- Save [this page](#) to your favorites to access CPA/PFS information.
- Watch this [short video series](#) to learn about navigating the PFP Section website.
- Ask your peers questions by joining the [AICPA PFP LinkedIn group](#).
- Contact the PFP team with your questions at financialplanning@aicpa.org.

PFP Section member benefits

Timely news and forward-thinking ideas

PFP News

A recap of new resources, professional news and upcoming PFP events

Bob Veres' Inside Information

Forward-thinking ideas on the profession and for your practice

Client-ready content

Broadridge Advisor™

Over 3,000 resources to help you talk with clients about complicated topics

Business Development Toolkits

Marketing materials showing the benefits of working with a CPA financial planner or a CPA/PFS

Learning opportunities

Technical and practice guides

In-depth content to help you advise clients and manage your practice

Hot topic toolkits and resources

- The Impact of Tax Reform on Planning Toolkit
- Roth IRA decision charts and conversion tools

Online education and free CPE

- 8 free CPE hours annually via [PFP Section webcasts](#).
- The [PFP Learning Library](#) contains recordings of all virtual PFP events.

Professional development and the CPA/PFS credential

Stand out from other CPAs and financial planners by obtaining the CPA-exclusive PFS credential. You can use the [PFP review materials](#) or the [PFP Certificate Program](#) to get you there.

Professional development through in-person learning

- Advanced PFP Conference as part of AICPA ENGAGE annually in June
- PFP Summit annually in January

For those new to planning

Tax and Financial Planning hub

- Resources to take you on your journey

The Personal Finance Scorecard and the *Analysis of a tax return for financial planning opportunities* tools to help you identify planning needs for clients

Quick-start learning

- Resources to help you make practice-related decisions
- Podcast series and The Roadmap to Developing a Tax & Financial Planning Business*

Building a Tax and Financial Planning Advisory Business Workshop

1.5 day in-person workshop prior to Advanced PFP Conference at AICPA ENGAGE

Roadmap Workshop to Introducing a Tax and Personal Financial Planning Advisory Business

2 day in-person workshop at various locations