Get the most out of your CPA/PFS credential.

Get connected to maximize your value.

- Visit this page to go directly to PFS-related benefits and content.
- Add the CPA/PFS logo to your email signature and website.
- Bookmark the PFP homepage (aicpa.org/pfp) to go directly to PFP-related tools and resources. (Note: If you are not a PFP Section member, some of this content will be locked.)
- 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.
- Ask your peers questions by joining the AICPA PFP LinkedIn group.
- Contact the PFP team with your questions at financialplanning@aicpa.org.

CPA/PFS credential benefits

Help clients find you.

CPA/PFS referral directory
Customize your CPA/PFS referral directory profile to reflect your expertise and allow the public to find you.

Marketing materials
- Use the client-facing advertisements, tools and presentation materials found in the CPA/PFS business development toolkit.
- Help the world understand what you do as a CPA/PFS by posting this video on social media or on your website.

Stay current with PFP News.
A recap of new resources, professional news and upcoming PFP events.

Get a discount.
Refer a CPA to sit for the comprehensive CPA/PFS exam or to apply for the CPA/PFS credential and earn a 100% credit on your PFS dues!

Continue your learning.
- If you did not complete the certificate program to earn your PFS, consider using this program to fill in the gaps and earn CPE.

Professional development through in-person learning
- Advanced PFP Conference as part of AICPA ENGAGE annually in June
- PFP Summit annually in January

Join the PFP Section.
If you are not a PFP Section member:
- The PFP Section complements your public visibility as a CPA financial planner, providing access to tools and resources that will help your practice and client relationships, including:
  - Client-ready content in Broadridge Advisor™
  - Technical and practice guides to help you advise clients and manage your practice
  - Hot topic toolkits on trending subjects such as Roth IRAs
  - 8 free hours of financial planning CPE via webcasts
  - And much more!