A CAREER AS A CPA FINANCIAL PLANNER CAN REALLY TAKE YOU PLACES.

IS A CAREER IN PERSONAL FINANCIAL PLANNING RIGHT FOR YOU?

Does this describe you?

- Good with numbers and analysis?
- Enjoy interacting with people?
- Want to have a positive impact on others?
- Want a career that’s both personally and professionally rewarding, intellectually challenging, well-respected by the CPA profession and provides work-life balance?

WHY FINANCIAL PLANNING?

PFP is projected to grow **2X FASTER** than the overall accounting profession.

27% Projected growth rate of demand for advisers through 2022.

*IBIS World 2014 U.S. Bureau of Labor Statistics*

With this great transfer of wealth comes the need for planning: tax, estate, retirement, risk management and investments. CPA financial planners can cut through the complexities, which will have a positive impact on the people receiving the transfer and can lead to new revenues streams for the practice.

$30 TRILLION WILL BE TRANSFERRED FROM ONE GENERATION TO THE NEXT IN THE COMING DECADES

WHERE CAN CPA FINANCIAL PLANNERS WORK?

- CPA firms offering both financial planning and traditional CPA services
- CPA firms with separately owned, registered investment advisory (RIA/wealth management firm)
- CPA firms affiliated with RIA or dealer-broker
- Financial planning/wealth management firms
- Family office
- Bank or wire house
- Law firms

WHAT WILL BE YOUR PATH TO BECOMING A CPA PERSONAL FINANCIAL PLANNER?

Are you:

- Student interested in going straight into PFP?
- Student wanting to explore several service lines before moving to PFP?
- Newly minted CPA with audit or tax background?
- Experienced CPA looking for a career change?

WHAT WILL YOUR PATH TO PFP LOOK LIKE?

For more information, visit aicpa.org/PFP.

Note: State boards of accountancy require specific education and experience requirements to become a CPA. Check with your state board or look up the latest requirements at ThisWaytoCPA.com.