Personal Financial Planning Section

AT A GLANCE

The Personal Financial Planning (PFP) Section is a community of CPA financial planners who are AICPA members and practice:

- Personal Financial Planning
- Investment Planning
- Charitable Planning
- Financial Independence (Retirement Planning)
- Risk Management
- Employee Benefits
- Estate Planning
- Income Tax Planning
- Special Needs

Benefits of Membership

Technical Resources

PFP Section members have access to numerous technical resources on the PFP website, including premier Forefield Advisor™ content. These comprehensive materials help you keep abreast of the PFP body of knowledge.

AICPA Conferences in Personal Financial Planning

- Tax Strategies for the High-Income Individual*
  – May 7 - 8, 2009, Las Vegas
- Advanced Estate Planning*
  – July 19 - 22, 2009
- Advanced Personal Financial Planning*
  – January 17 - 20, 2010

** PFP Section members receive a discount!*

Web Seminars

Topics include PFP practice management, marketing your firm and PFP-related technical issues. Seminars are archived for future member access.

Forefield Advisor

A Web-based education and client communication tool to deliver current and concise advice to clients. Create personalized client presentations with articles, concept pieces and case studies, and have relevant knowledge at your fingertips.

Member Communications

- *The Planner* – award-winning, bi-monthly newsletter
- Monthly PFP and PFS Committee Chair letters
- *Financial Planning Digest* – a monthly electronic newsletter, with industry news, tools and ideas for CPA financial planners
- PFP Member Exclusive – periodic email highlighting a PFP member benefit

Resource Guides for Members & Their Clients

- AICPA's *Statements on Responsibilities in Personal Financial Planning Practice*
- *Disaster Recovery: A Guide to Financial Issues* and *Disaster Preparedness: A Guide to Financial Issues* – guides developed by the AICPA and the National Endowment for Financial Education (NEFE), in collaboration with the Red Cross, to help disaster victims recover from financial loss
- *Prudent Practices for Investment Advisors* – fiduciary handbook published by the Foundation for Fiduciary Studies and technically reviewed by the AICPA PFP Executive Committee. With this handbook, investment practitioners will learn a disciplined process to prudently manage investment decisions

Still More PFP Resources

Regulatory Insight

PFP Section members receive timely information on laws and regulations.

Networking Opportunities

Invaluable networking opportunities with some of the best financial planners in America are available to PFP Section members throughout the year. Three events are planned for 2009.
Visit us at pfpnetworking.org

Advocacy

The PFP Section works to promote a favorable environment for CPA financial planners by monitoring legislation and representing your interests.

Member Discounts

In addition to savings on premier Forefield Advisor Web content, PFP Section members receive discounts on three PFP-related conferences, webcasts, Forefield newsletters and client seminar material, and other products.

(see reverse for PFS Credential information)

TO LEARN MORE: VISIT aicpa.org/PFS | CALL 888.777.7077 | EMAIL PFPinfo@aicpa.org
M-F 9am - 6pm ET