



# Personal Financial Specialist Credential

## AT A GLANCE

The Personal Financial Specialist Credential is available exclusively to CPA members of the AICPA who offer personal financial planning services.

### Objectives of the PFS Credential program

- To increase public awareness of the CPA/PFS as the preferred Personal Financial Specialist Credential
- To help credential holders promote their practices through the PFP website and PFS marketing tools
- To enhance the quality of PFP services that CPA/PFS Credential holders provide
- To increase practice development and career opportunities for PFS Credential holders

## Benefits of the PFS Credential

### PFS Credential holders receive all PFP Section benefits, plus:

#### Find a CPA/PFS Online Database

A special database created to help consumers find personal financial planners and help professionals refer clients to a local CPA/PFS

#### PFS Marketing Toolkit

- Marketing resources, including a marketing plan template
- Media and public relations resources
- PFS logo and usage guidelines
- Sample press release

#### Networking opportunities

- Upcoming networking events planned for 2009:
  - April 27 - 28
  - August 20 - 21
  - November 4 - 6
- Visit us at [pfpnetworking.org](http://pfpnetworking.org)

#### Writing and Speaking Opportunities

As the experts of the PFP field, PFS Credential holders are invited to:

- Volunteer as a Money Doctor for the AICPA's 360 Degrees of Financial Literacy consumer initiative (see [360financialliteracy.org](http://360financialliteracy.org))
- Write short articles for *Wealth Management Insider*
- Serve as a speaker for Wi\$eUp consumer teleconferences for the DOL Women's Bureau
- Write articles for the *Journal of Accountancy*

## PFS Credential Requirements

### To be a PFS, the CPA must demonstrate personal financial planning accomplishment in three areas:

#### 1. Experience

- Income Tax Planning
- Insurance Planning
- Investment Planning
- Financial Independence (Retirement Planning)
- Personal Financial Planning Process and Fundamentals of Financial Planning
- Employee Benefits
- Estate Planning
- Charitable Planning
- Special Needs

#### 2. Education

- CPE in Personal Financial Planning
- Attendance at AICPA and State CPA Society conferences in PFP
- College/university courses in financial planning
- Authoring/presenting research in PFP

#### 3. Examination (at least one of the following exams):

- PFS
- CFP
- ChFC

Until 12/31/2010:

- CFA
- NASD Series 7, 65, 66

(see reverse for PFP Section information)

TO LEARN MORE: VISIT [aicpa.org/PFS](http://aicpa.org/PFS)

CALL 888.777.7077

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M-F 9am - 6pm ET