



# Get the most out of your PFP Section.

## Get connected to maximize your value.

- Bookmark the PFP homepage ([aicpa.org/pfp](http://aicpa.org/pfp)) to go directly to your benefits.
- Add [aicpapfp@e2.aicpa.org](mailto: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](mailto: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*

- Proactive 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