

PFS Credential Exam Registration and Scheduling Terms and Conditions

The following information is included in this document to provide guidance to candidates to register for and schedule their PFS Exam sessions.

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Registering for the Exam Associated with the PFS Pathways

All exams are available to be taken at any time during the year and online, in addition the comprehensive PFS exam can be taken at nationwide testing centers. The exam associated with the respective pathways are:

- Standard Pathway [Comprehensive PFS Exam](#)
- Certificate Pathway PFP Certificate exams: [Retirement](#), [Estate](#),
[Investments](#), [Insurance](#)
- Experienced Pathway [Experienced CPA Assessment](#)

Individuals interested in taking any of these exams must register online and pay the required exam fee to the AICPA. To register, click the links on the exams listed in the previous paragraph and register (purchase) the appropriate exam for the pathway you are pursuing. Online registration is available to both AICPA and non-AICPA members. Upon registering, candidates will receive a purchase confirmation via email. This confirmation does not serve as the Notification to Schedule mentioned below.

Notification to Schedule (NTS) Email

The exams are administered on Webassessor, the exam platform of our vendor, Kryterion. The AICPA will provide registrants their Notification to Schedule (NTS) email within 10-12 days after registering for the exam with instructions on setting up their Webassessor account and scheduling their exam.

Upon receipt of the NTS, registrants should follow the instructions and use the assigned voucher code included in the NTS to set up their account and schedule their exam session on the Webassessor site.

The candidate must have a valid email address on file with the AICPA or provide one during the registration process. If there is not a valid email address on file, the candidate will not receive the NTS email. The NTS email will contain the candidate voucher code and test administration information including a website link and a toll-free telephone number to schedule a test appointment.

If a candidate does not receive this Notice to Schedule email, he/she should notify the AICPA at PFS@aicpa.org or call 888.777.7077.

Scheduling an Exam

Exam scheduling will be available immediately upon receipt of the NTS letter. It is important that candidates schedule their exam sessions as soon as possible because test center and online-proctored appointments are made on a first-come, first-serve basis. Many testing centers have limited seats. The sooner one schedules, the more likely one will be able to take the exam at his/her desired date, time, and if appropriate, location.

NOTE: The closer to the exam window that candidates schedule an appointment, the more challenging it becomes to select a *preferable* date, time, and potentially, location.

When a candidate is prepared to schedule his/her exam appointment, he/she should refer to the steps below. A walkthrough of this process can be accessed [here](#).

1. Visit www.webassessor.com/aicpa_pfs.
2. Follow the steps to establish a test taker account.
 - If you have already established a test taker account, use the username and password that was previously provided. For assistance with your username or password, please contact the AICPA Service Center Operations Department at 888.777.7077 or email pfs@aicpa.org.
3. Upon receipt of email confirmation from Webassessor providing username and password, login to Webassessor to schedule exam.
4. Click on the *Schedule Exam* link in the task bar at the top of the page.
5. Select the category of exam (comprehensive, certificate, or experienced), select the exam and click on the *Register Now* button.
6. For a comprehensive exam at a test center, select the desired test center location.
7. Select the desired date and time that is available.
8. After the Shopping Cart page confirms the exam, location if appropriate, date and time, proceed to *Check Out*.
9. Upon checkout, enter the voucher code that was provided in the NTS letter.
10. Upon acceptance of the voucher code, click the *Submit* button and then click on the *Done* button on the subsequent screen.
 - If the voucher is rejected, it is usually because an exam was selected that the voucher did not apply to. Vouchers will apply separately to: Comprehensive exam OR any of the Certificate exams OR the Experienced CPA Assessment.
11. A scheduling confirmation email will be sent to the email address provided.
 - **It is important to print and/or keep a copy of this confirmation page. If you are going to a test center, it includes the Test Authorization Code required for exam admittance on-site. It is not needed for online exams.**

Reminder: Candidates may schedule ONLY after receipt of the NTS letter.

If there are difficulties scheduling an online proctored exam time or finding one of the High-stakes Online Secure Testing (HOST) locations within a 100-mile radius, and/or a HOST location with available dates and times, candidates should contact KRYTERION Test Taker Support at 800.403.6199 or 602.659.4708 Monday through Friday from 9:00 AM to 8:00 PM, (ET) or send an email to hostschedulerequest@kryteriononline.com. For test centers, many times they are able to contact a local testing center and extend their hours to enable the test to be taken at your desired location.

Refunds

All PFS Exams and PFP Certificate exams registration fees are non-refundable and are not transferable to other AICPA programs. If a candidate fails to schedule and/or attend the testing appointment, he/she will forfeit all exam fees paid.

Rescheduling and Cancellations

If a candidate is unable to appear for his/her originally scheduled appointment, he/she has can reschedule the original appointment time for another date. For test centers, the candidate must complete the reschedule **no less than 72 hours prior to the scheduled appointment**. Online exam candidates must do this **no less than 24 hours prior to the scheduled appointment**.

Candidates are able to reschedule without AICPA intervention as often as needed so long as it is done 24 or 72 hours (as indicated above) prior to the exam session. Exceptions will ONLY be made for bereavement or illness supported by appropriate medical documentation.

In order to reschedule an exam session, please use the following steps:

1. Login to the test taker account created on Webassessor at http://www.webassessor.com/aicpa_pfs.
2. On the Home page within the Scheduled Exams section, click on the Details link.
3. On the Registration Details page, click on Reschedule.

Special Conditions Appointments (for Candidates with Special Needs)

All Kryterion HOST Locations and online proctored exams are required to operate under the guidelines of equal opportunity, affirmative action and the Americans with Disabilities Act (ADA) if in the USA, as well as all other local, state and federal regulations. HOST Locations are also required to abide by all laws regarding the accommodation of individuals with disabilities with respect to the accessibility of the physical premises as well as seating and computer workstation configurations, e.g. wheelchair accessibility.

During the registration process, candidates with disabilities or special needs are required to make arrangements with the AICPA in advance of scheduling their test session. The process is as follows:

1. Special accommodations candidates will register (purchase) the exam.
2. Candidate will contact the AICPA directly (via email at PFS@aicpa.org or via phone at 888.777.7077) to identify their needs, make special arrangements, and identify desired

- test date and, if appropriate, location (at least 45 days prior to desired test date).
3. AICPA will request from candidate and obtain documentation supporting special needs consideration as well as the desired test date and location.
 4. After obtaining necessary documentation and test date and location information, AICPA will contact Kryterion and make scheduling arrangements on behalf of candidate.
 5. Candidate will be provided confirmation of scheduled test appointment via email to the email address provided by the candidate.

In cases where it is necessary and based upon AICPA approval, Kryterion will send professional interpreters, test readers, recorders or Foreign Language Interpreters to the HOST Location to assist the candidate during his/her test session.

All special accommodations requests must be made at least 45 days in advance of the desired schedule date. For anyone that requires such accommodations and has not done so in advance, the test session will be administered under normal circumstances.

Examination Tips

Knowledge of the subject matter is essential for success on the examination. However, there are some examination-taking techniques that can assist candidates in taking the exam. The following are some suggested techniques:

- **Be punctual.** Plan to arrive at the examination room well in advance of the starting time (at least 15 minutes). Allow time for any unforeseen delays.
- **Budget your time.** Consider the number of multiple-choice and case study questions in each part of the exam and the time allotted so that each question can be addressed.
- **Answer all questions.** All multiple-choice questions should be answered with the best answer. There is no penalty for incorrect answers, and grades are based solely on the total number of correct answers.
- **Read the case-study questions.** Carefully read the entire case-study question to get a general idea of the subject matter being tested. Then reread the question and make notes on the scratch paper provided of the pertinent information. Some candidates approach a case-study question by reading the requirements first and then by reading the situation for the information it contains. This procedure may enable candidates to identify the data more rapidly and to classify the information for pertinence. The case-study questions are intended to be straightforward. Assumptions are rarely necessary.

Exit Survey

When candidates complete the exam, they will be asked to complete a brief automated survey that will provide feedback on how to improve the testing process.

Test Results

Exam grading takes place immediately and the result is provided immediately after the exam. Test results are also emailed at the conclusion of the grading process.

Results are provided on the basis of “pass” or “fail”. All of the PFS exams are designed to psychometrically assess whether candidates have a sufficient base level comprehension of the PFP body of knowledge, and the results provide an indication of whether the exam taker meets this minimum threshold.

NOTE: No results will be given over the phone.

After Passing the Examination

After the candidate passes the examination, an official pass/fail result is displayed on-screen and a letter will be sent via email notifying him/her of the results. This display and email will detail the next steps the candidate needs to address, such as completing the PFS Credential application online. The website identifies the experience and education required to obtain the PFS Credential for the various pathways. Once all the requirements have been met and the online credential application has been submitted, a PFS credential welcome letter will be sent in 10-12 days.

Upon receipt of the welcome letter, the member will be eligible to use the PFS Credential in compliance with the rules of the state in which he/she practices. Separately, the member will receive information about the digital badge to be used in email, websites, and social media, as well as instructions on printing a certificate if one is desired.

Members are not certified until they receive this emailed notice.

Failing the Examination

If a candidate does not pass the PFS comprehensive examination and wishes to retake the exam, he/she can purchase the Retake PFS Comprehensive Exam for a discounted fee of \$100. The PFP Certificate Exams and the Experienced CPA Assessment come with two attempts to pass. If additional attempts are needed, they can be re-purchased on the AICPA website.

Additional Questions

For questions about the PFS Credential program, candidates may contact the AICPA Member Service Center at 888.777.7077 or send an email to PFS@aicpa.org or the Personal Financial Planning team at financialplanning@aicpa.org.

Candidates can view other important information about the PFS Exam and the PFS Credential online by going to www.aicpa.org/PFSexam and future.aicpa.org/resources/article/personal-financial-specialist-credential-track-for-experienced-cpas

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