



Take your career to the next level by adding three simple letters: PFS

The demand is already high. And growing!

The U.S. Bureau of Labor Statistics projects a 27% growth in the need for personal financial advisers over the next six years and 30% over the next 10.



Why add the Personal Financial Specialist (PFS) credential to your CPA?



63% of CPAs believe that AICPA advisory service credentials have increased their credibility.*

*Source: 2013 AICPA Compensation Study



Essential competency in core financial planning areas puts your career on the fast track to increased compensation.

Why get the PFS credential?

It tells your clients you:



Represent a 125-year-old established, trusted and regulated profession



Are distinguished from other financial planners through your training, experience, testing and education as a CPA



Are competent and confident in the subject matter and are committed to continued learning in personal financial planning



Have demonstrated your expertise in the specialized topic of personal financial planning (PFP): tax, retirement, estate, risk management and investment planning



Have expertise backed by the world's largest member association representing the accounting profession – the AICPA

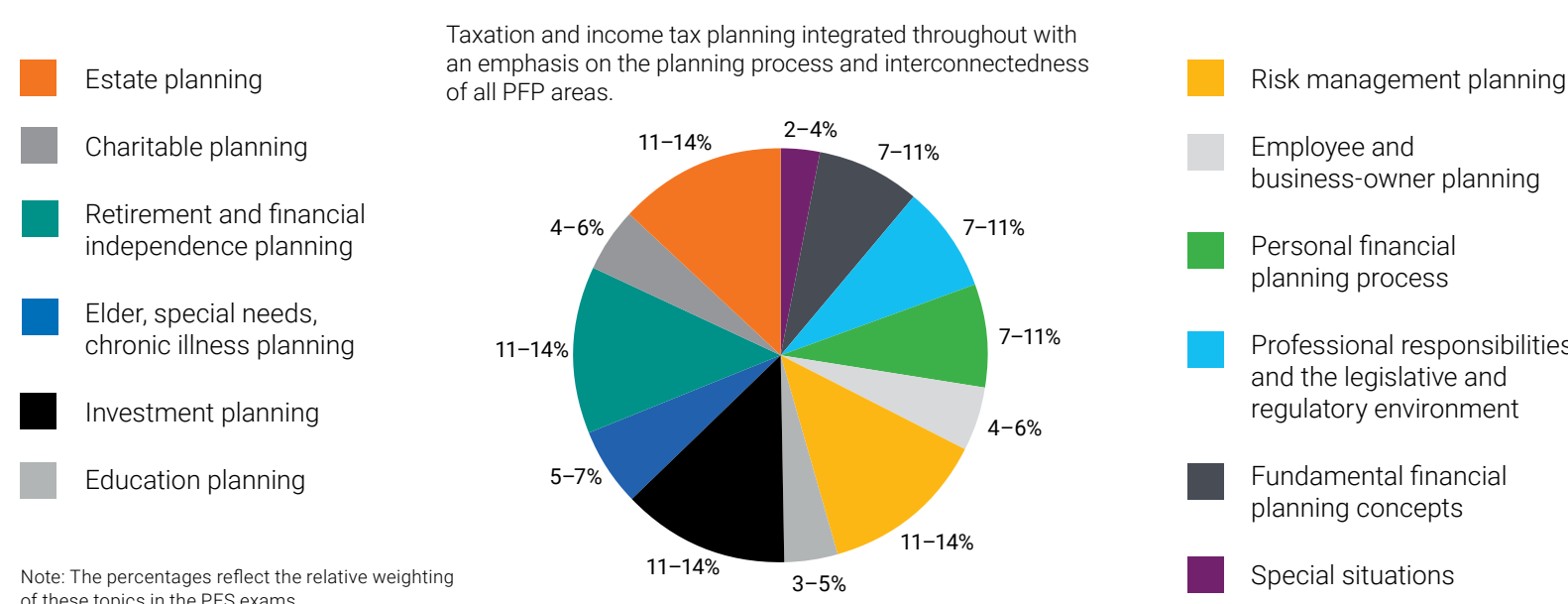


Have access to a community of like-minded professionals and the latest tools, resources and learning opportunities – and more – to be successful

Pathways to the CPA-exclusive PFS Credential



Step 1: Review the PFP Body of knowledge.



Step 2: Determine your best pathway.

Have at least 3,000 hours of PFP experience in the last five years (up to 1,000 can be tax compliance).



Standard pathway

This provides the flexibility to choose your sources of PFP education (including the AICPA-provided education for the certificate program) and the opportunity to complete the exam requirement in one sitting.



Certificate pathway

Split the education and exams into five PFP certificates and enjoy the flexibility to fit these modules into your schedule, plus the overall curriculum provides a level of accountability to ensure you attain your credential.



Experienced pathway

An opportunity to apply the knowledge you have gained as an experienced CPA professional with streamlined academic requirements, including a CPE course focused on the standards, planning process and regulatory environment with case studies applying PFP topics in practice, and a shorter, but comprehensive, PFS assessment.

Step 3: Complete the requirements for your pathway.

	Learn	Pass the exam
Standard pathway	75 hours of CPD in the last five years	A 5-hour comprehensive online proctored PFS exam
Certificate pathway	Complete the five PFP Certificate courses	Each certificate module has a 100-minute online proctored certificate exam that meets the PFS exam requirement
Experienced pathway	105 hours of CPD in the last seven years, including the required PFS Experienced CPA Education course	A 100-minute comprehensive online proctored PFS Assessment

Step 4: Get credentialed.

Initial certification requirements



Regular AICPA membership in good standing



Valid, active and unrevoked CPA permit, license or certificate issued by a legally constituted state authority



Completed PFS application indicating fulfillment of all requirements, including education, experience and exam

Learn more! Visit aicpa.org/pfs to find out more.