EMAIL: What’s Your Game Plan for Starting an Advisory Practice?

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Subject Line: What’s Your Game Plan for Starting an Advisory Practice?

Pre-Header: Obtain an AICPA credential before starting an advisory practice.

Many financial professionals are offering advisory services as a natural evolution of their business. Though it takes a lot of hard work, adding an advisory service sets you apart from the competition, elevates your status in the marketplace, increases client retention and generates new, more profitable revenue streams.

Before deciding whether to offer an advisory service, you should formulate a game plan and weigh all the considerations. If you’re serious about pursuing this path, one of the first steps you’ll need to take is to obtain a credential in your advisory area.

For some, an AICPA credential provides a pathway to gaining in-depth knowledge as you move toward offering new services. If you already have in-depth knowledge, experience and education in an advisory area, a credential helps you market your services and differentiate yourself, your firm or your role within an organization.

The AICPA offers exclusive credentials for qualified financial professionals — Certified in Financial Forensics (CFF®), Personal Financial Specialist (PFS™), Accredited in Business Valuation (ABV®), Certified Information Technology Professional (CITP®), and the Certified in Entity and Intangible Valuations (CEIVTM) — that can differentiate you as having knowledge and expertise in a specialty practice area, giving you, your firm or your organization a competitive advantage.

If you decide to pursue a credential, the AICPA will support you with resources and tools to help you maintain the highest level of competency in your specialty.

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