



CPA Personal Financial Specialist

Credentials Count: Hire a CPA/PFS Professional

A top-notch plan for your future is necessary – and invaluable – so why entrust it to an adviser who’s anything less than the best?

The PFS Credential is available only to CPAs – so you’ll be choosing a planner from an exclusive group of highly trained financial specialists.

And a CPA/PFS professional will help you effectively and advantageously plan your family, business and personal financial future.

All Financial Planners Are Not Created Equal

What makes a CPA/PFS professional so special? Here’s a closer look at what sets apart a CPA with the PFS Credential – and how that makes him or her uniquely qualified to serve you:

Focused Education

College education in accounting; in-depth education in financial planning (estate, investment, income tax, retirement, risk management); and continuing professional education

Specialized Experience

Experience in key areas of financial planning and the ability to apply that expertise to a variety of clients and situations

Examination

Successful completion of the rigorous CPA Exam and the PFP Exam/Experience requirement, which covers financial planning

Ethics

Compliance with State Board of Accountancy rules and regulations and the AICPA’s Code of Professional Conduct – plus uncompromising objectivity and integrity

Tax Know-How

Tax-planning experience ensures this critical component of financial planning is considered in every decision

Exclusivity

CPA/PFS professionals are part of a select group comprising only the best CPAs in the financial planning field – and thrive on consistently sharing best practices and learning about new developments

A CPA with the PFS Credential combines the objectivity, integrity and experience that are hallmarks of the CPA profession with specialized expertise. A CPA/PFS professional is a personal financial planner you can trust.



WHAT ARE YOUR FINANCIAL CONCERNS?

- Managing your cash flow
- Building retirement savings
- Estate planning
- Determining insurance needs
- Minimizing your tax liability
- Saving in an education fund
- Managing your financial risk
- Planning for eldercare

Your CPA/PFS professional will help you via services ranging from an informal consultation to a comprehensive financial plan – whatever works for you.