



Envision more.

Extend your client services with new personal financial planning certificates.

Over the next 10 years, roughly **10,000 baby boomers a day are estimated to turn 65**, according to a Pew Research Center study. As an incredible amount of wealth changes hands, boomers will seek advice as they deal with the increased complexities associated with retirement and investment planning.

There's never been a greater demand for personal financial planning services.

The AICPA offers five personal financial planning certificates:

- Retirement Planning
- Investment Planning
- Estate Planning
- Risk Management and Insurance Planning
- PFP Practical Applications

The four technical certificate programs - Retirement Planning, Investment Planning, Estate Planning and Risk Management/ Insurance Planning - are a combination of education and exam, providing the opportunity for your staff to enhance their knowledge and demonstrate competence in that specific core discipline. The fifth certificate, PFP Practical Applications, requires only education without an exam. By earning all five certificates, your staff will meet the education and exam requirements to obtain the PFS credential.

For more information, visit
PFPcert.AICPAStore.com.

To register your staff, call 800.634.6780, option 1, or email AICPALearning@aicpa.org.

Group discounts are available for five or more registrations.

The personal financial planning certificate programs are intended for those who:

Want to demonstrate knowledge in these practice areas by earning one or more of the PFP certificates.



Certificates:

Your staff can display their competence and understanding in one or more core areas of PFP by displaying a digital badge awarded upon completion of certificate requirements. The four technical certificates require your staff to either complete the education bundle and pass the certificate exam, an online proctored exam taken from the convenience of their home or office, or pass the exam by using prior education and experience. The PFP Practical Application Certificate requires successful completion of the continuing education courses.

Need CPE credits to maintain their certifications as a CPA or CPA/PFS (also qualifies for CFP® CE credit).



Education:

If CPE or continuing education is your goal, you can purchase the education bundle or individual courses alone, without the certificate exam, so your staff can earn CPE for their CPA license or CPD to obtain or maintain their PFS credential. If your staff members hold the PFS credential, there is no need for them to take the certificate exam, as the PFS credential exam tests the material covered in the certificates. The CFP board also approved these courses to meet their requirements for CE credits.

Are interested in using the certificate program to earn the PFS credential.



PFS credential pathway:

By obtaining the five certificates, your staff will meet the exam requirement, and if your staff takes the certificate education, they will exceed the education requirement to obtain the PFS credential. Your staff will then be considered PFS Credential Candidates until they meet the PFP-related experience requirement and apply for the PFS credential.

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