

Personal Financial Specialist Marketing Toolkit

Why Hire a PFS?

The messaging below will help you as a PFS Credential holder communicate your value as a financial planning expert and demonstrate your competitive advantage over other non-CPA personal financial planners to your clients, prospects and referral partners.

How to Use this Messaging:

1. Review these messages prior to business meetings.
2. Copy and paste the information into letters, emails and business proposals.
3. Include the messaging on your firm's Web site and in your marketing brochures.
4. Include these points in your media interviews and other public relations activities.

Use these message points to assist you with developing new business, building strategic partnerships and informing the media, consumers and other professionals about your specialized Personal Financial Planning (PFP) knowledge, skills and experience.

What is PFS?

PFS, or Personal Financial Specialist, is the financial planning specialty credential issued by the American Institute of Certified Public Accountants (AICPA) exclusively to qualified CPAs like myself with proven expertise and experience in comprehensive personal financial planning. The AICPA is the premier professional association for CPAs in the U.S. and has over 330,000 members. You must be a CPA member in good standing of the AICPA before you can obtain the PFS Credential.

Why is PFS a preferred choice among financial planning credentials?

PFS is granted exclusively to CPAs like me who are members in good standing of the AICPA. As a PFS Credential holder, I demonstrate a comprehensive knowledge of the core areas of financial planning. Also, to obtain the credential, I met stringent requirements with professional work experience, education and training and passed an examination that tests my financial planning knowledge. As an added benefit, when you choose me as a CPA/PFS for your financial planning needs, you also gain an advantage from my knowledge and expertise in related areas such as tax, accounting and business management. This ensures that your needs are more fully met through an integrated, holistic approach.

What are other reasons I should hire a CPA who holds a PFS Credential?

Studies by independent groups have repeatedly shown that CPAs are among the most trusted advisors to the public. As such, CPAs have built a reputation over the last 100 years as a profession that provides competent, ethical and trustworthy advice. As a client, you can count on objective financial planning advice from me that will always be in your best interest.

Personal financial planning is a core competency for CPAs, and PFS is the only personal financial planning credential that is specifically designed for CPAs and the unique perspective we bring to the practice.

How do CPAs qualify for the PFS Credential?

To obtain a PFS, CPAs must prove their broad-based knowledge and business experience in core areas: estate planning, investment planning, the personal financial planning process, personal income tax planning, retirement planning and risk management planning. They must also pass an intensive qualifying examination and commit to life-long learning requirements.

How can I be assured that you are serving my best interests?

CPAs adhere to the AICPA's strict code of professional conduct and ethics. In addition, PFS Credential holders follow the AICPA's Statements on Responsibilities (SORs) in Personal Financial Planning. These SORs describe specific planning procedures as well as guidelines for developing plans and communicating advice to clients. As a PFS Credential holder, I follow these guidelines when working with my clients and other advisors such as bankers and attorneys.