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1986

## AICPA PFP: The AICPA Personal Financial Planning Division

American Institute of Certified Public Accountants. Personal Financial Planning Division

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# AICPA PFP

# AICPA PFP

## The AICPA PERSONAL FINANCIAL PLANNING DIVISION

*A New Program for  
AICPA Members Who Have  
an Interest in  
Personal Financial Planning*

## The New AICPA Personal Financial Planning Division *Responding to Your Responsibilities and Interests in Personal Financial Planning*

The Personal Financial Planning Division of the American Institute of Certified Public Accountants – authorized by Council of the AICPA in May 1986 – has been established for those CPAs who have an interest in personal financial planning. It recognizes the professional needs of today's CPA-personal financial planner by providing opportunities for those CPAs to –

- Share their special knowledge
- Expand their competence
- Enhance their profitability
- Exchange experiences and ideas
- Communicate the competence of CPAs in the personal financial planning field to the public.

The AICPA Personal Financial Planning Division is part of the AICPA structure. Membership is voluntary and is available to CPAs who are members of the American Institute.

## HOW YOU WILL BENEFIT FROM MEMBERSHIP IN THE PFP DIVISION

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### THE PLANNER

You will receive a subscription to this new AICPA quarterly newsletter which focuses on new developments in the personal financial planning field.

*The Planner* will regularly bring you useful information on such subjects as – effective practice management... practice development... marketing strategies... regulatory and insurance concerns. It will also bring you technical information that will help you provide personal financial planning services in a professional and profitable manner.

In addition, *The Planner* will keep you up-to-date on the agendas and activities of the AICPA personal financial planning committee, as well as issues papers and other special reports.

### PUBLIC AWARENESS PROGRAM

You will support and benefit from an intensive public awareness program that will reinforce in the minds of the public the image of CPAs as competent, objective and trustworthy personal financial planning professionals.

*More than 30 percent of member dues will be spent on this national program.*

### PFP PRACTICE AIDS

You will receive, as part of your membership, technical practice aids and position papers issued by the Personal Financial Planning Division.

As soon as your membership application is received, you will receive *Issues Involving Registration Under the Investment Advisers Act of 1940*, a new book that offers guidance to CPAs contemplating registration.

And later in the membership year, you will receive a book of forms and standard reports used in the conduct of a personal financial planning practice.

### PFP DIVISION MEETINGS

You will be able to attend the annual meeting of the Personal Financial Planning Division where you can participate in discussions with leaders in the field at practical how-to-do-it sessions dealing with such key subjects as – improving the profitability of your personal financial planning practice... developing an effective plan for your client... proposed legislation... coping with regulation... ethics issues... and other personal financial planning problems.

## The AICPA/PFP Division Benefits the Accounting Profession as it Assists You

The AICPA/PFP Division will increase professional and public recognition of the preeminent role that CPAs play in providing PFP services in today's highly competitive personal financial planning field.

The AICPA/PFP Division will enable a larger number of AICPA members to participate in personal financial planning activities. Participating members will enhance their competence in the use of PFP skills – and their professionalism in offering PFP services – through increased association and collaboration with their peers.

## Your Membership Dues Are Modest

The current annual fee for membership in the AICPA/PFP Division is \$100 for the period August 1, 1986 through July 31, 1987. This fee covers all of the membership benefits described, including a subscription to *The Planner* and support for the public awareness program. (More than \$30 of each member's dues will be spent on this national public awareness effort.)

## Don't Be Left Out

If you have a professional interest in personal financial planning, join the ranks of America's leading personal financial planning professionals – those CPAs who are members of the AICPA Personal Financial Planning Division.