PFS Live 2026

Your Path to the AICPA Personal Financial Specialist™ Designation

The intersection between tax knowledge and wealth management is essential to providing clients with the guidance they need to pursue their financial goals. Attaining the Personal Financial Specialist™ (PFS) designation positions you as the trusted advisor capable of delivering this vital expertise.

Not for just any CPA, the PFS designation is designed to complement the extensive tax knowledge of experienced CPAs with financial planning techniques for every need from accumulating wealth to maximizing retirement income.

Areas of knowledge include these Avantax Intelligent Planning concepts:

- Tax-Focused Intelligent Strategies
- Retirement Planning and Withdrawal Strategies
- Family Risk Management
- Business Planning
- Legacy Planning
- Education Planning
- Cash Flow Management

What the CPA/PFS Can Do for Your Practice

Distinguish yourself from other planners and offer a greater level of confidence in your services when you earn your PFS designation. Not only can you provide a one-stop shop solution, but with a more diverse service offering, you can realize more income from current clients and attract new ones who value working with a single trusted Financial Professional.

An Easy Path to Becoming an IAR

When you earn your PFS, you have the option of applying for a waiver for the Series 65 securities exam which allows you to register as an Investment Advisor Representative. It's a simplistic approach for those who already have extensive tax and planning knowledge and are ready to take the next step toward providing comprehensive, investment-related advice.

The AICPA and Avantax — A Powerful Combination

With the AICPA PFP Division community and Avantax by your side, you have all the support you need to help grow a thriving practice with happy clients. We've been partnering with tax professionals like you for over 40 years to increase client satisfaction and help grow their practice. No matter what your goals for your practice are, we have flexible solutions to help you pursue them.

Have questions or want to reserve your seat? Visit avantax.com/pfslive