CERTIFIED PUBLIC ACCOUNTANT AND PERSONAL FINANCIAL SPECIALIST (CPA AND PFS)

Ramaq Chools
Consulting &Training

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Contents

Introduction to CPA and PFS Program

Imagine being the go-to financial expert who clients trust to handle their comprehensive financial planning needs. The Certified Public Accountant and Personal Financial Specialist (CPA and PFS) program equips CPA professionals with the skills to offer top-notch financial planning services. This course covers the 12 areas of personal financial planning, including tax planning, retirement planning, estate planning, investment planning, risk management, and education planning. After completing the course, candidates can take the CPA and PFS exams and apply for the CPA and PFS designation.

Why Choose Chools?

Numbers That Speak for Themselves:

- **10,000+ Successful Alumni:** Join a network of impactful professionals.
- **95% Job Placement Rate:** Secure your future with Chools' proven track record.
- **20+ Years of Excellence:** Trust in a legacy of education and industry expertise.
- **200+ Industry Partnerships:** Leverage our connections for real-world insights and opportunities.

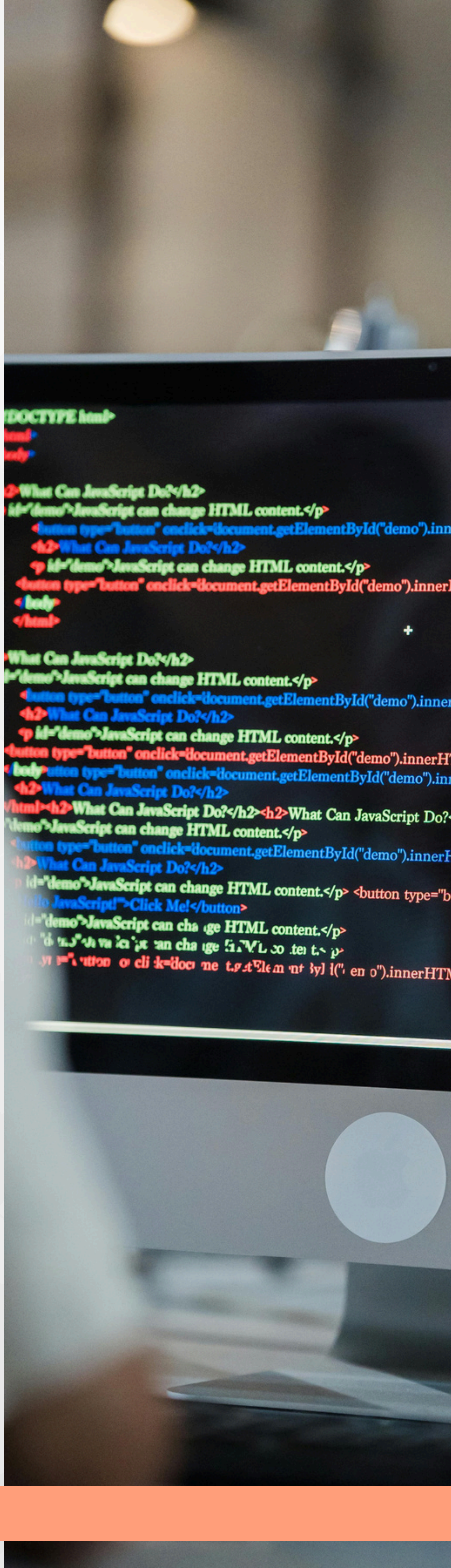
What Sets Us Apart?

- **Expert Instructors:** Learn from industry veterans with hands-on experience.
- **Hybrid Learning Model:** Balance online flexibility with in-person engagement.
- **Comprehensive Curriculum:** Stay ahead with courses designed meet market demands.
- **Community and Networking:** Be part of an active community of learners and professionals.

Who Can Apply?

Eligibility Criteria:

- Valid CPA license and current membership of the AICPA.



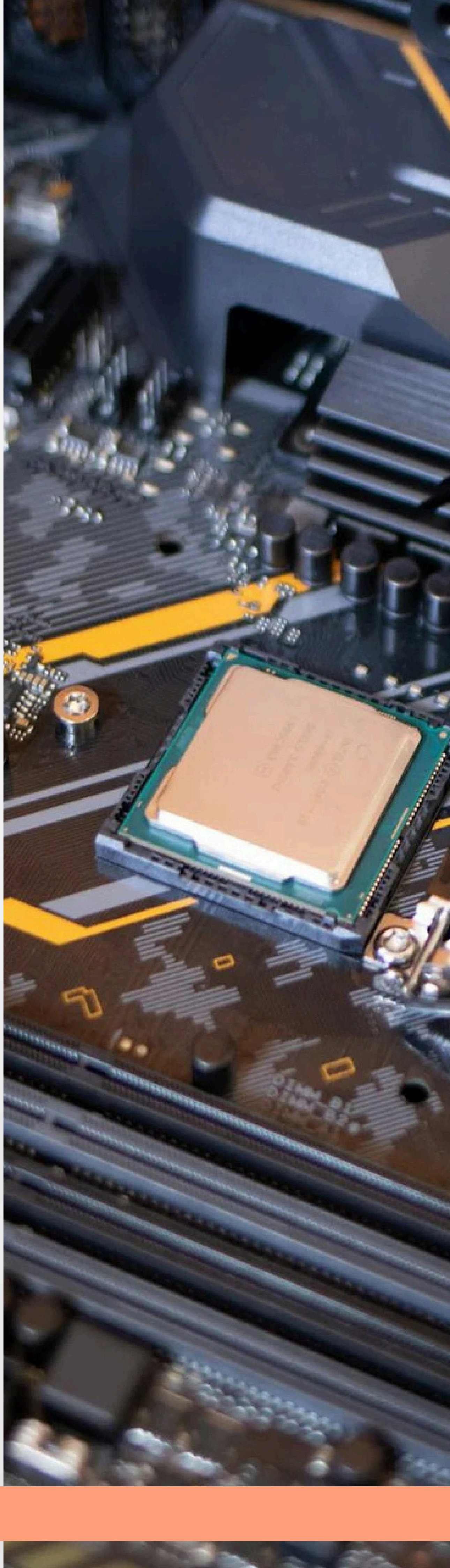
- At least two years of full-time or equivalent experience in personal financial planning or related fields.
- Completion of at least 75 hours of financial planning education in the PFS Body of Knowledge categories within the five years before applying for the credential.
- Passing a PFP-related exam, such as the PFS exam, the PFP Certificate exams, or the PFS Experienced CPA Assessment.

Program Overview

The CPA and PFS Program provides a comprehensive education in personal financial planning. Our curriculum covers a wide range of topics to ensure a thorough understanding, combining theoretical knowledge with practical, hands-on experience.

Learning Mode:

- **Hybrid Learning Model**: Combines online learning with in-person sessions for flexibility and interactive engagement.
- **Interactive Sessions**: Includes live webinars, workshops, and Q&A forums with expert instructors and peers.
- **Self-paced Learning**: Access course materials anytime, allowing you to learn at your own pace.



PROGRAM OBJECTIVES

- Build knowledge and skills in tax planning, retirement planning, and estate planning.
- Understand investment planning, risk management, and education planning.
- Prepare for the CPA and PFS exams.
- Foster continuous learning and personal growth.
- Encourage teamwork and collaboration.
- Prepare for advanced roles in personal financial planning.

EXPECTED OUTCOMES

- Proficiency in personal financial planning principles and techniques.
- Practical experience through hands-on exercises.
- Strong analytical and problem-solving skills.
- Application of best practices in personal financial planning and advising.
- Innovation in understanding and managing clients' financial needs.

SKILLS LEARNED

- **Tax Planning:** Techniques for effective tax planning and management.
- **Retirement Planning:** Strategies for planning clients' retirement goals and needs.
- **Estate Planning:** Understanding and implementing estate planning strategies.
- **Investment Planning:** Techniques for managing investments and portfolios.
- **Risk Management:** Understanding and managing financial risks.
- **Education Planning:** Strategies for planning educational expenses and funding.
- **Professional Ethics:** Applying ethical standards and professional conduct in financial planning.
- **Strategic Thinking:** Developing and implementing strategic financial initiatives.
- **Decision-Making:** Making informed decisions based on financial analysis.
- **Communication Skills:** Enhancing communication and interpersonal skills in financial planning contexts.

Program Outline

Required Core Modules

Module 1: Introduction to Personal Financial Planning
- Basics of personal financial planning and its importance.

Module 2: Tax Planning I
- Techniques for effective tax planning and management.

Module 3: Tax Planning II
- Advanced tax planning strategies.

Module 4: Retirement Planning I
- Strategies for planning clients' retirement goals and needs.

Module 5: Retirement Planning II
- Advanced retirement planning techniques.

Module 6: Estate Planning I
- Understanding and implementing estate planning strategies.

Module 7: Estate Planning II
- Advanced estate planning techniques.

Module 8: Investment Planning I
- Techniques for managing investments and portfolios.

Module 9: Investment Planning II
- Advanced investment management strategies.

Module 10: Risk Management I
- Understanding and managing financial risks.

Module 11: Risk Management II
- Advanced risk management techniques.

Module 12: Education Planning I
- Strategies for planning educational expenses and funding.

Module 13: Education Planning II
- Advanced education planning techniques.

Module 14: Professional Ethics I
- Understanding and applying ethical standards in financial planning.

Module 15: Professional Ethics II
- Advanced ethical standards and professional conduct.

Module 16: Scenario and Sensitivity Analysis I
- Basics of performing scenario and sensitivity analysis.

Program Outline

Enrollment Now Open!

Take the first step towards mastering personal financial planning and earning your CPA and PFS credentials. Enroll in our Certified Public Accountant and Personal Financial Specialist (CPA and PFS) Program and enhance your career with Chools.

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