PERSONAL FINANCIAL SPECIALIST (PFS)

Ramaq Chools
Consulting &Training

Email: info@ramaqchools.com
Phone: +966536834733
Website: ramaqchools.com

Contents

1. Introduction to Personal Financial Specialist

2. Why Choose Chools

3. Who Can Apply?

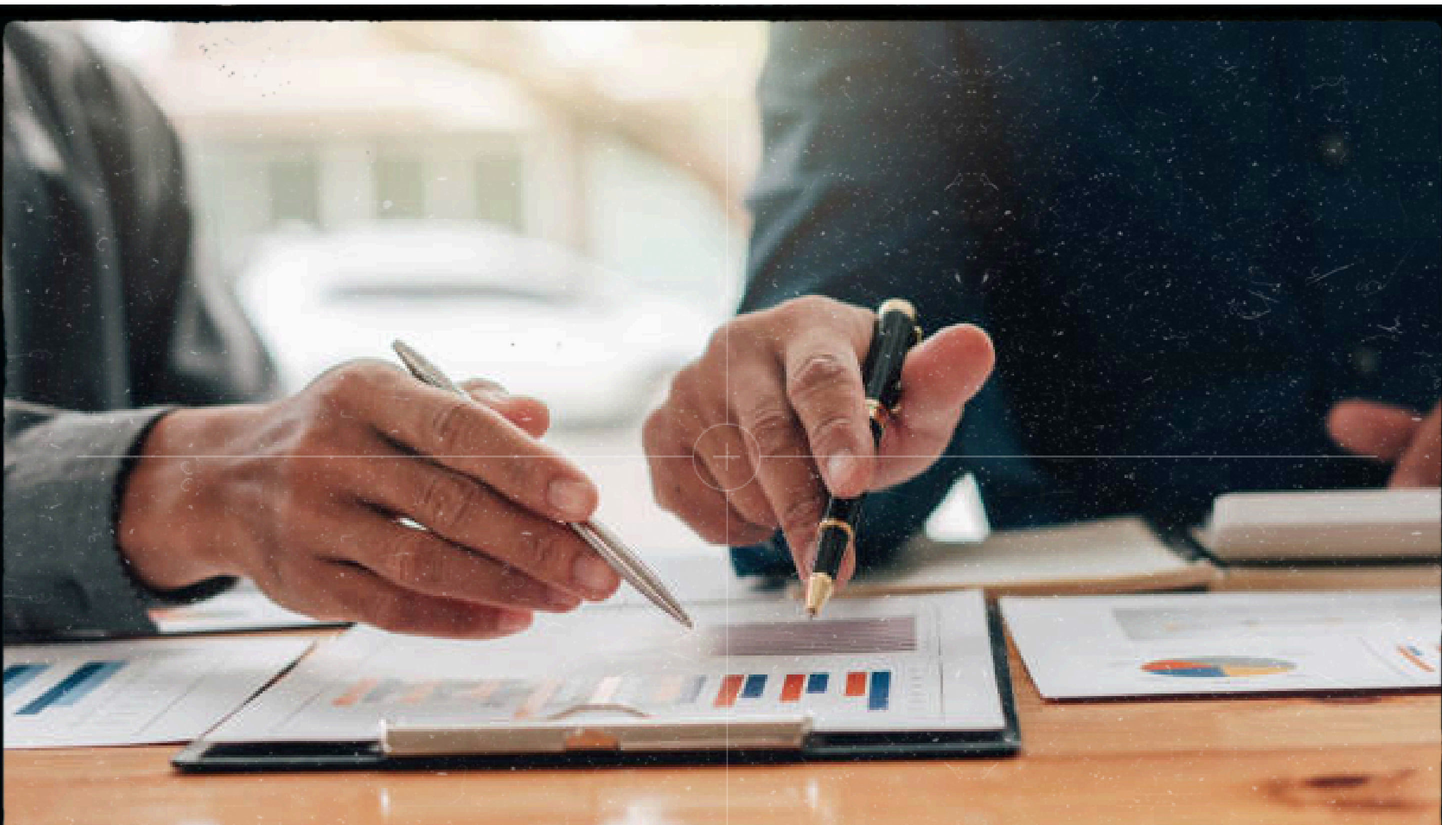
4. Program Overview

5. Program Objectives and Expected Outcomes

6. Skills Learned

7. Program Outline

8. Enrollment Information



Introduction to Personal Financial Specialist

Imagine elevating your role as a Certified Public Accountant (CPA) by specializing in personal financial planning and wealth management services. The Personal Financial Specialist (PFS) course prepares CPAs to offer comprehensive financial planning solutions to their clients. Covering vital topics such as estate planning, retirement planning, investing, insurance, and tax strategies, this course also prepares you thoroughly for the PFS exam, a key requirement for obtaining the PFS credential from the American Institute of Certified Public Accountants (AICPA).

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.

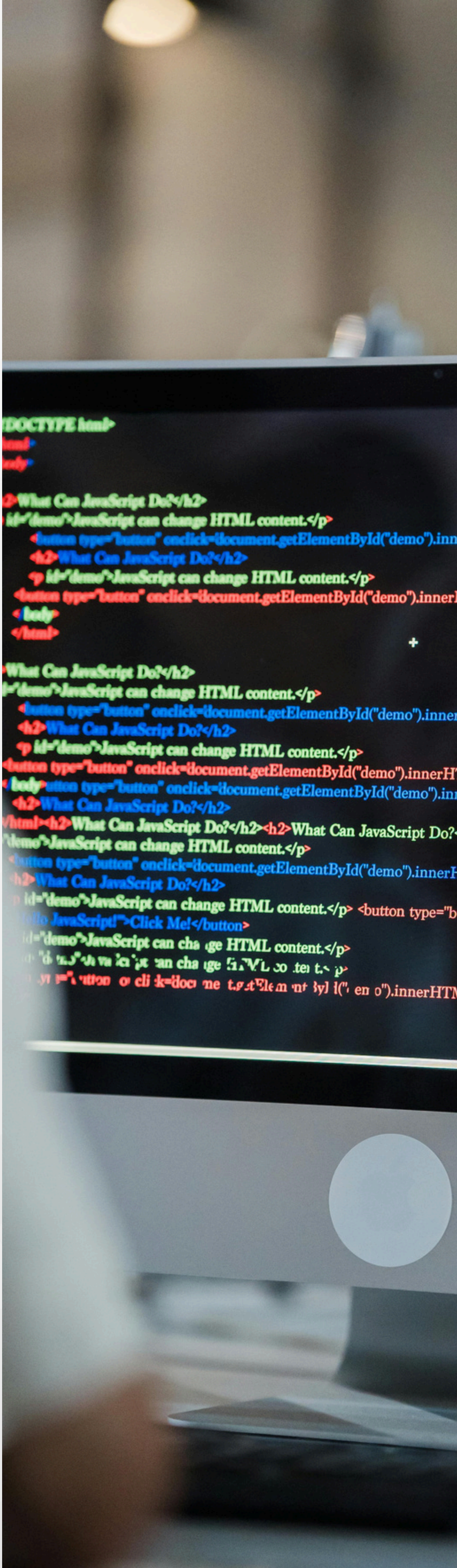
What Sets Us Apart?

- **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.

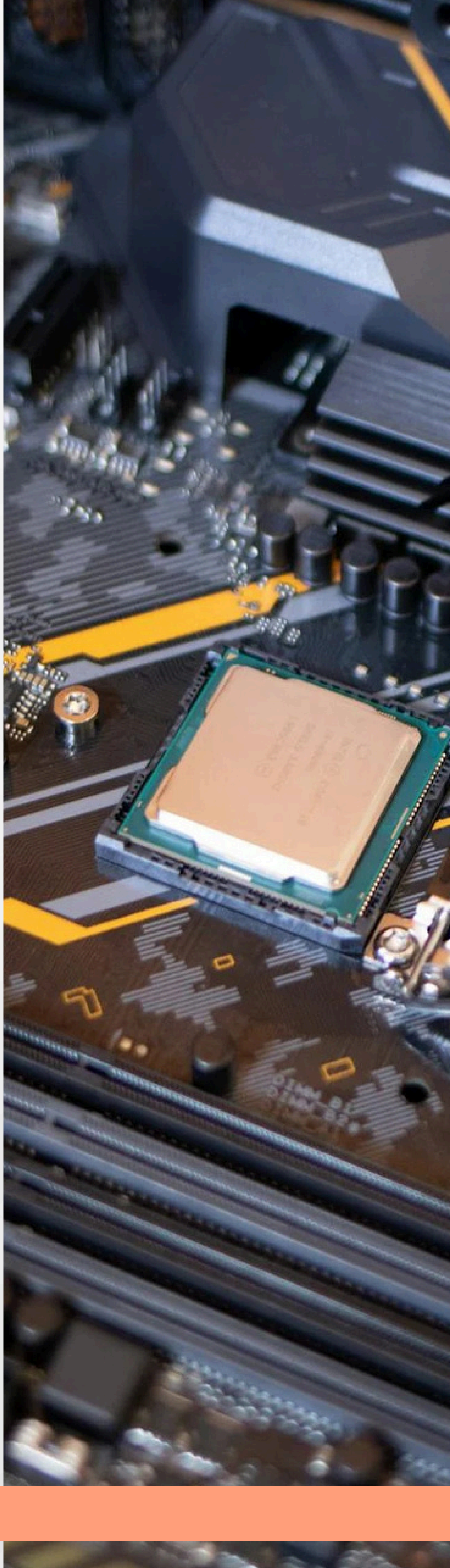
Who Can Apply?

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

Learning Mode:

- **Self-Paced Learning:** Access course materials anytime, allowing you to learn at your own pace.
- **Interactive Sessions:** Includes live webinars, workshops, and group discussions with expert instructors and peers.

PROGRAM OBJECTIVES

- Build knowledge and skills in estate planning, retirement planning, investing, insurance, and tax strategies.
- Understand comprehensive financial planning principles and practices.
- Prepare for the Personal Financial Specialist (PFS) exam.
- Foster continuous learning and personal growth.
- Encourage teamwork and collaboration.
- Prepare for advanced roles in financial planning and wealth management.

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 financial planning and wealth management.
- Innovation in understanding and managing clients' financial needs.

SKILLS LEARNED

- **Estate Planning:** Techniques for planning and managing estates.
- **Retirement Planning:** Strategies for planning clients' retirement goals and needs.
- **Investing:** Understanding and implementing investment strategies.
- **Insurance:** Techniques for managing insurance policies and risk.
- **Tax Strategies:** Effective tax planning and management.
- **Professional Ethics:** Understanding and applying ethical standards 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: Estate Planning I
- Techniques for planning and managing estates.

Module 3: Estate Planning II
- Advanced estate 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: Investing I
- Understanding and implementing investment strategies.

Module 7: Investing II
- Advanced investment management techniques.

Module 8: Insurance I
- Techniques for managing insurance policies and risk.

Module 9: Insurance II
- Advanced insurance management strategies.

Module 10: Tax Strategies I
- Effective tax planning and management.

Module 11: Tax Strategies II
- Advanced tax strategies and techniques.

Module 12: Professional Ethics I
- Understanding and applying ethical standards in financial planning.

Module 13: Professional Ethics II
- Advanced ethical standards and professional conduct.

Module 14: Scenario and Sensitivity Analysis I
- Basics of performing scenario and sensitivity analysis.

Module 15: Scenario and Sensitivity Analysis II
- Advanced scenario and sensitivity analysis techniques.

Program Outline

Module 16: Case Studies and Practical Applications

- Real-world case studies and practical applications in financial planning.

Enrollment Now Open!

Take the first step towards mastering personal financial planning and earning your PFS credential. Enroll in our **Personal Financial Specialist (PFS)** Program and enhance your career with Chools.

Email: info@ramaqchools.com Phone: +966536834733 Website: ramaqchools.com