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AICPA Announces Standing Ovation Honors in Personal Financial Planning

17 Young CPAs Acknowledged at the AICPA Advanced PFP Conference in Las Vegas

June 12, 2018

LAS VEGAS (June 12, 2018) – The American Institute of CPAs (AICPA) today honored 17 CPAs under the age of 40 for their contributions to personal financial planning with the Personal Financial Planning (PFP) Standing Ovation (<https://www.aicpa.org/interestareas/personalfinancialplanning/pages/standing-ovation-program.aspx>). These CPA financial planners were honored at the AICPA's Advanced PFP Conference in Las Vegas, part of AICPA ENGAGE.

"The AICPA is delighted to acknowledge each of these honorees for their contributions to personal financial planning," said Andrea Millar, CPA/PFS, Association of International Certified Professional Accountants Director of Personal Financial Planning. "The achievements of these young PFS credential holders emphasizes the impact CPAs are able to make in the field of financial planning at an early age."

Examples of the contributions this group of CPAs has made to the profession include bringing their firms into the future with cutting edge technology, enhancing processes to provide a better client experience, volunteering their financial planning services nationally and in their local communities, mentoring fellow CPAs, and serving as financial planning thought leaders to the media.

Personal financial planning is a growing field which affords CPA financial planners a wealth of opportunity. An estimated 10,000 baby boomers (<http://www.pewresearch.org/fact-tank/2010/12/29/baby-boomers-retire/>) will turn 65 each day over the next decade. As a result, employment of personal financial planners is projected (<https://www.bls.gov/ooh/Business-and-Financial/Personal-financial-advisors.htm>) to grow 15 percent from 2016 to 2026, much faster than the average for all occupations according to the Bureau of Labor Statistics. Trillions of dollars will be transferred from one generation to the next in the coming decades. As this wealth changes hands, Americans will need help with their financial plans to make sure they keep more in their pocket.

Recipients of the third annual Standing Ovation recognition in personal financial planning are noted on the PFP Section website (<http://www.aicpa.org/interestareas/personalfinancialplanning/Pages/default.aspx>) and acknowledged during a general session at the Advanced PFP Conference. In addition to personal financial planning, the AICPA's Standing Ovation program recognizes young CPAs who exhibit exemplary professional achievement in business valuation and forensic accounting, and information management and technology assurance.

In addition to making a notable contribution to the profession, nomination requirements for the Standing Ovation program in the personal financial planning area include maintaining an active CPA license, being an AICPA member in good standing and holding the Personal Financial Specialist (PFS) credential. Nominees must also be 40 years old or younger.

The 2018 PFP Standing Ovation recipients are listed below in alphabetical order:

David Barral, CPA/PFS, MBAF CPAs, LLC, New York, NY
Leslie Blanchard, CPA/PFS, TrueWealth Management, Atlanta, GA
Joseph Doerrer, CPA/PFS, Bessemer Trust, Red Bank, NJ
Christopher Hess, CPA/PFS, TFO Phoenix Inc, Phoenix, AZ
Timothy Higgins, CPA/PFS, NCH Tax & Wealth Advisors, Inc., Fullerton, CA
Michael Landsberg, CPA/PFS, Homrich Berg, Atlanta, GA
Sarah Lane, CPA/PFS, CLS Financial Advisors, Inc., Portland, OR
Mason Longstreth, CPA/PFS, TFO Phoenix, Inc., Phoenix, AZ
Robert McConchie, CPA/PFS, Athlete Wealth Management Group, Scottsdale, AZ
Deborah Meyer, CPA/PFS, Worthy Nest LLC and SV CPA Services, Saint Charles, MO
Brett Mills, CPA/PFS, McCarthy, Rose & Mills LLP, Frisco, TX
Matthew Rosenberg, CPA/PFS, RoseCap Investment Advisors, Grand Junction, CO
Roger Seiler, CPA/PFS, Cox & Company, Lafayette, IN
Dale Snell, CPA/PFS, Prairie Hills Financial Group, Inc., Hutchinson, KS
Ben Westerman, CPA/PFS, HM Capital Management, Clayton, MO
Robert Westley, CPA/PFS, Northern Trust, New York, NY
Tony Yu, CPA/PFS, DSG Business, Tax, & Wealth Planning, West Covina, CA

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