



Financial Planning for CPAs (CPA Practice Guide Series)

Phyllis Bernstein, Linda A. Lach, Jim H. Ainsworth

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This book is a comprehensive reference source for CPAs who provide, or want to provide, personal financial planning services. It includes guidelines and strategies on how to make the transition from a traditional accounting practice to financial planning and investment advisory services. It also shows CPAs how to convert existing clients to financial planning, and gives advice on communication techniques, structuring an investment advisory entity, and monitoring and measuring planning results.

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