

## **Local CPA Earns Exclusive Personal Financial Specialist Credential as Wealth Management Expert**

**CARLISLE, PA – BRADLEY A. MENTZER**, a CPA wealth management expert located in Carlisle, has recently been awarded the Personal Financial Specialist (PFS) Credential by the American Institute of Certified Public Accountants (AICPA).

The PFS Credential, established in 1987 by the AICPA, is granted to qualified CPAs with considerable professional experience in wealth management. Currently, several thousand CPAs hold the PFS Credential nationwide. CPA/PFS Credential holders are ranked among the most qualified wealth managers in the marketplace, and many are listed as top wealth managers in *Worth's* annual ranking.

Bradley A. Mentzer met the requirements to earn the PFS Credential, which include passing a comprehensive technical exam covering personal wealth management topics, demonstrating more than 1,400 hours of business experience during the past five years as well as completing lifelong learning and education activities. The PFS Credential is granted exclusively to CPAs who are members in good standing of the AICPA, which binds them to the AICPA Code of Professional Conduct.

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“Given their formal education and technical training in the areas of accountancy and taxation, CPAs are the most qualified, knowledgeable and objective financial planning professionals,” said James Metzler, AICPA vice president of small firm interests. “Supplementing this background with the PFS Credential demonstrates a CPA’s commitment to providing clients with the highest level of expert financial planning services.”

CPAs who have earned the PFS Credential must be recertified every three years to maintain their credential.

### **About the AICPA**

The American Institute of Certified Public Accountants ([www.aicpa.org](http://www.aicpa.org)) is the national, professional association of CPAs, with approximately 350,000 members, including CPAs in business and industry, public practice, government, and education. It sets ethical standards for the profession and U.S. auditing standards for audits of private companies; federal, state and local governments; and non-profit organizations. It also develops and grades the Uniform CPA Examination. Headquartered in New York, the AICPA also maintains offices in Washington, DC; Durham, NC; Lewisville, TX and Ewing, NJ.

### **About Bradley A. Mentzer CPA/PFS**

Brad is located at 35 E. High Street, Suite 104, in Carlisle, PA and is available by phone at 717-249-6327. Products and Services Offered include Retirement Income Planning, Fee-Based Asset Management Services, Mutual Funds, Fixed and Variable Annuities, Qualified Retirement Plans, Traditional and Roth IRAs, Educational Savings Plans, Long-Term Care Insurance and Life Insurance.

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