EXPAND YOUR OPPORTUNITIES

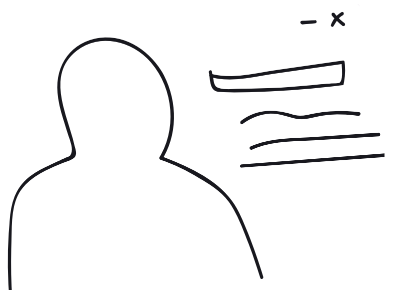
THE AMERICAN COLLEGE OF FINANCIAL SERVICES®

TPCP™

Tax Planning Certified Professional™

Specialized expertise in tax planning

Why Become a TPCP™?



- **Comprehensive knowledge** in lifecycle tax planning
- **Cutting-edge strategies** from industry leaders
- **Credibility** with clients seeking tax-informed planning advice
- **Recognition** of your status as a specialist in a critical field
- **Preparation** for the ever-evolving tax advisory landscape

7 in 10

Consumers with at least $250,000 in investable assets want help with tax and retirement planning.[1]

[1]Herbers & Company Service Market Growth Study. 2023.

A Sizeable Unmet Need

More than **68% of insurance agents and registered representatives, 54% of IARs, and 57% of dually registered advisors** reported **small business owner tax planning** as the **most frequently requested** service among those **they are not currently providing.***

The Tax Planning Certified Professional® (TPCP®) Program's curriculum covers many tax planning topics relating exclusively to small business owners.

* The American College of Financial Services. Advisory Services Survey. 2024.

Elevate Your Practice With Tax-Informed Expertise

The demand for integrated tax planning services is growing, and clients are seeking advisors who can deliver strategies to achieve their goals while reducing tax liability.

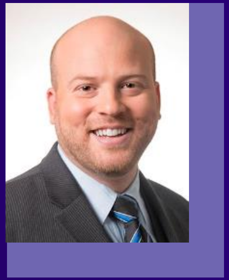
A TPCP™ elevates your expertise with specialized knowledge in:

- Tax planning during accumulation and during retirement
- Tax planning at death and special situations
- Advanced estate and retirement planning knowledge
- Strategies for minimizing state and federal taxes

Learn From the Who's Who of Tax Planning Experts

Gain advanced, applied knowledge from the leading authorities in tax planning.

The Tax Planning Certified Professional™ program includes insights from:



Jeffrey Levine, CFP®, CPA/PFS, ChFC®,RICP®, CWS, AIF, BFA™

Sophia Duffy, JD, CPA, AEP®

Michael Finke, PhD, CFP®

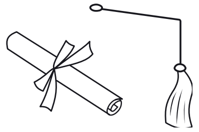
Alan Gassman, JD, LLM (Taxation), AEP® (Distinguished)

Michael Kitces, MSFS, MTAX, CFP®, CLU®,ChFC®, RHU, REBC, CASL

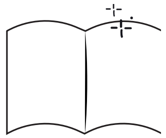
Ed Slott, CPA

Joellen Meckley, JD, MHS, ChSNC®

Your Education Differentiator

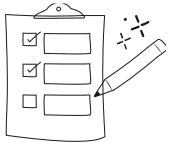


Elite faculty of nationally recognized academics, researchers, and practitioners



Comprehensive curriculum supporting a complex approach to tax planning

Asynchronous, self-study format providing busy working professionals with increased flexibility



Continuing education credit for College CE requirements. Currently, in process for CFP Board review for CE.

Program at a Glance

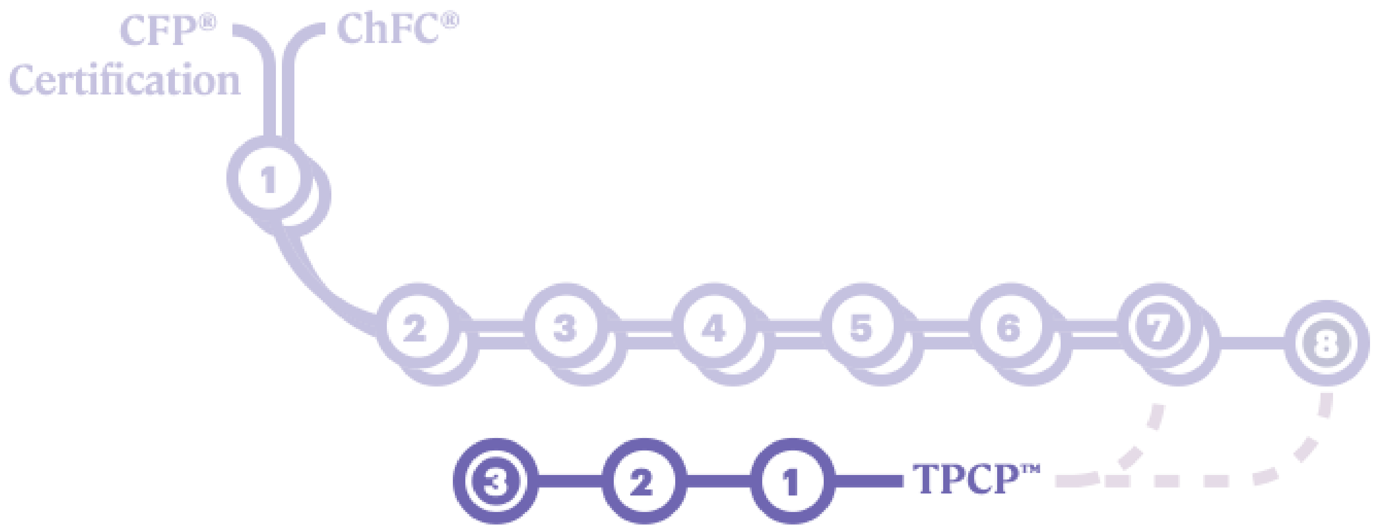
- **Tuition:** $2,695 for 3-course package/ $995 per course
- **Timing:** Complete in 12 months or less

- **Format:** 100% online e-learning with dynamic videos and graphics, practice exams, and knowledge checks to engage students and aid in retention

- The TPCP™ Program qualifies for College Professional Recertification Program (PRP) continuing education credit and is currently in review for CFP Board approval for CE. The TPCP™ is a not for credit offering.

TPCP™ Roadmap to Success

An excellent complement to planning credentials such as CFP® or ChFC®, the TPCP™ Program can fit into any lifelong learning journey with The American College of Financial Services.



TPCP™ Requirements

There are no prerequisite courses needed to begin the TPCP™ Program. However, if you have not previously completed the CFP® Certification Education or Chartered Financial Consultant® (ChFC®) Programs, HS 321 Fundamentals of Income Taxation is recommended.

To receive the TPCP™ designation, you must:

- Successfully complete the three required courses
- Score 70% or higher on each course’s final exam
- Agree to comply with The American College Code of Ethics and Procedures
- Participate in the annual Professional Recertification Program (PRP)

Expand Your Opportunities

By choosing **The American College of Financial Services**
as your lifelong learning partner, you'll benefit from:

- Extensive professional network of financial professionals and leaders
- Ready-to-use knowledge delivered by industry-leading experts
- Interactive community with frequent professional development events
- Advanced planning skills and real-world application not delivered elsewhere
- Modern education through the latest in mobile-friendly, e-learning technology
- Prestigious pedigree of nearly 100 years of academic excellence

Thank You

To learn more, visit **TheAmericanCollege.edu/TPCP**

The marks of TPCP™ and ChFC® are the property of The American College of Financial Services and may be used by individuals who have successfully completed the initial and ongoing certification requirements for these designations. The College can disallow use of any designation if advisors do not adhere to the program's ethical standards, continuing education, and other requirements.