

Business Unit Certification Requirements



	Assurance		Consulting			Tax		Wealth
	Assurance	Risk Advisory	BTG	CAAS	RPA	Tax	Tax Accounting Solutions	Wealth Management
Supervisor								<ol style="list-style-type: none"> Series 65 CPFA, CMT, CFA, CFP <u>or</u> CPA
Manager	CPA	<ol style="list-style-type: none"> CISSP 	CPA*, ASA*, CFA*, <u>or</u> ABV*	CPA*, J.D.*, <u>or</u> EA*	<ol style="list-style-type: none"> QKA <u>or</u> CPA 	CPA, J.D., <u>or</u> EA	CPA*, J.D.*, <u>or</u> EA*	<ol style="list-style-type: none"> Series 65 CPFA, CMT, CFA, CFP <u>or</u> CPA
Senior Manager	CPA	<ol style="list-style-type: none"> CISSP 	CPA*, ASA*, CFA*, <u>or</u> ABV*	CPA*, J.D.*, <u>or</u> EA*	<ol style="list-style-type: none"> QKA <u>or</u> CPA QKC* 	CPA, J.D., <u>or</u> EA	CPA*, J.D.*, <u>or</u> EA*	<ol style="list-style-type: none"> Series 65 CPFA, CMT, CFA, CFP <u>or</u> CPA
Partner	CPA	<ol style="list-style-type: none"> CISSP CPA 	CPA*, ASA*, CFA*, <u>or</u> ABV*	CPA*, J.D.*, <u>or</u> EA*	<ol style="list-style-type: none"> QKA <u>or</u> CPA QKC* 	CPA, J.D., <u>or</u> EA	CPA*, J.D.*, <u>or</u> EA*	<ol style="list-style-type: none"> Series 65 CPFA, CMT, CFA, CFP <u>or</u> CPA

**Preferred, but not required*