

Department Certification Requirements



	Accounting Advisory	Accounting Clarity	Audit & QR	BTG	Estate & Trust	Risk Advisory	RPA	Tax	Wealth Management
Supervisor									- Series 65 - CPFA, CMT, CFA, CFP <u>or</u> CPA
Manager	CPA	CPA*	CPA	CPA*, ASA*, CFA*, <u>or</u> ABV*	CPA, J.D., <u>or</u> EA	1. CISSP	1. QKA <u>or</u> CPA	CPA, J.D., <u>or</u> EA	- Series 65 - CPFA, CMT, CFA, CFP <u>or</u> CPA
Senior Manager	CPA	CPA*	CPA	CPA*, ASA*, CFA*, <u>or</u> ABV*	CPA, J.D., <u>or</u> EA	1. CISSP	- QKA <u>or</u> CPA - QKC*	CPA, J.D., <u>or</u> EA	- Series 65 - CPFA, CMT, CFA, CFP <u>or</u> CPA
Partner	CPA	CPA*	CPA	CPA*, ASA*, CFA*, <u>or</u> ABV*	CPA, J.D., <u>or</u> EA	- CISSP - CPA	- QKA <u>or</u> CPA - QKC*	CPA, J.D., <u>or</u> EA	- Series 65 - CPFA, CMT, CFA, CFP <u>or</u> CPA

**Preferred, but not required*