

Department Certification Requirements



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

**Preferred, but not required*