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Carly Purtill, CPA, obtains Personal Finance Specialist (PFS) designation from American Institute of CPAs

Highland Heights, OH (October 28, 2016) - Cleveland-based financial advising and wealth management firm Purtill Financial LLC announces that advisor Carly Purtill has successfully completed all the requirements to obtain the Personal Finance Specialist (PFS) credential from the American Institute of CPAs, joining an elite group of professionals who have demonstrated advanced knowledge of tax, estate, retirement, investment and insurance planning.

The PFS credential, established in 1987 by the AICPA, is awarded only to CPAs with extensive training and experience in financial planning. To earn the credential, CPAs must have at least 75 hours of personal financial planning education and 3,000 hours of planning experience within the previous five year period. They also must pass a comprehensive exam covering eleven topic areas and be a member in good standing with the AICPA, binding them to the AICPA Code of Professional Conduct and the Statement on Standards in Personal Financial Planning Services.

"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 Jeannette Koger, the AICPA's vice president of member specialization and credentialing. "Supplementing this background with the CPA/PFS credential demonstrates a CPA's commitment to providing the highest level of expert financial planning services. For clients, that translates to financial planning that is CPA strong -- comprehensive financial strategies that put their needs and interests first."

Many CPA/PFS credential holders regularly appear on lists of top financial planners. In addition to meeting rigorous requirements to join this elite group, Carly must meet recertification requirements every three years to maintain the credential.

Firm president Donald Purtill noted "Carly has worked in the business for a number of years now. Obtaining this designation is a testament to the dedication and expertise that she brings to the firm. She has excelled as a CPA in public accounting and industry and now as an investment advisor. Her work is certainly appreciated by our clients."

As fee-only financial advisors, Purtill Financial acts as fiduciaries, working solely in the best interest of its clients and accepting no fees, commissions, or any other payments from brokerage firms or mutual fund companies in exchange for its recommendations. Working with a fee-only adviser provides assurance to investors that the advice received is objective and designed only to help the client's financial situation. The firm does not charge fees for the initial client meeting where it will review portfolios and provide general financial advice.

Purtill Financial LLC is a fee-only wealth management and financial advisory firm registered in the States of Ohio and Florida as a Registered Investment Advisor with offices in Highland Heights, OH and Fort Myers Beach, FL. The firm currently has over $90 million in assets under management and serves more than 130 client families in 13 states.

Purtill Financial is one of a limited number of NAPFA (National Association of Personal Financial Advisors) registered financial advisers in the Northeast Ohio area serving individuals and families who seek professional, honest, and unbiased investment advice without sales commissions. Purtill Financial LLC provides investment management, retirement planning and tax planning services and currently has four registered professionals on its staff. The firm's website is: www.purtillfinancial.com.#