

PFS Personal Financial Specialist Practice Test Questions and Answers

1. What does PFS stand for in financial planning?

- A) Professional Financial Services
- B) Personal Financial Specialist
- C) Private Financial Systems
- D) Public Financial Standards

2. Who awards the PFS credential?

- A) Certified Financial Planner Board
- B) American Institute of CPAs (AICPA)
- C) Financial Planning Association
- D) National Association of Personal Financial Advisors

3. What is a primary prerequisite for obtaining the PFS credential?

- A) Bachelor's degree in finance
- B) Valid CPA license
- C) Series 7 license
- D) Insurance license

4. Which area is NOT typically covered in PFS specialization?

- A) Tax planning
- B) Estate planning
- C) Investment planning
- D) Medical diagnosis

Answers: 1-B 2-B 3-B 4-D

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