Certificate in Personal Finance for CPAs: Your Life, Your Clients, Your Legacy

Certificate Description

This certificate equips CPAs with practical, actionable knowledge to strengthen their own financial well-being while enhancing their ability to support clients and families with confidence.

CPAs regularly navigate complex financial decisions in both their professional and personal lives, yet structured training in personal finance is often limited.

Through real-world scenarios and clear decision-making frameworks, participants will build capability across key areas including cash flow planning, debt management, investing, tax considerations, and risk mitigation. The program also reinforces ethical boundaries and effective communication, ensuring CPAs can provide appropriate guidance while maintaining professional standards.

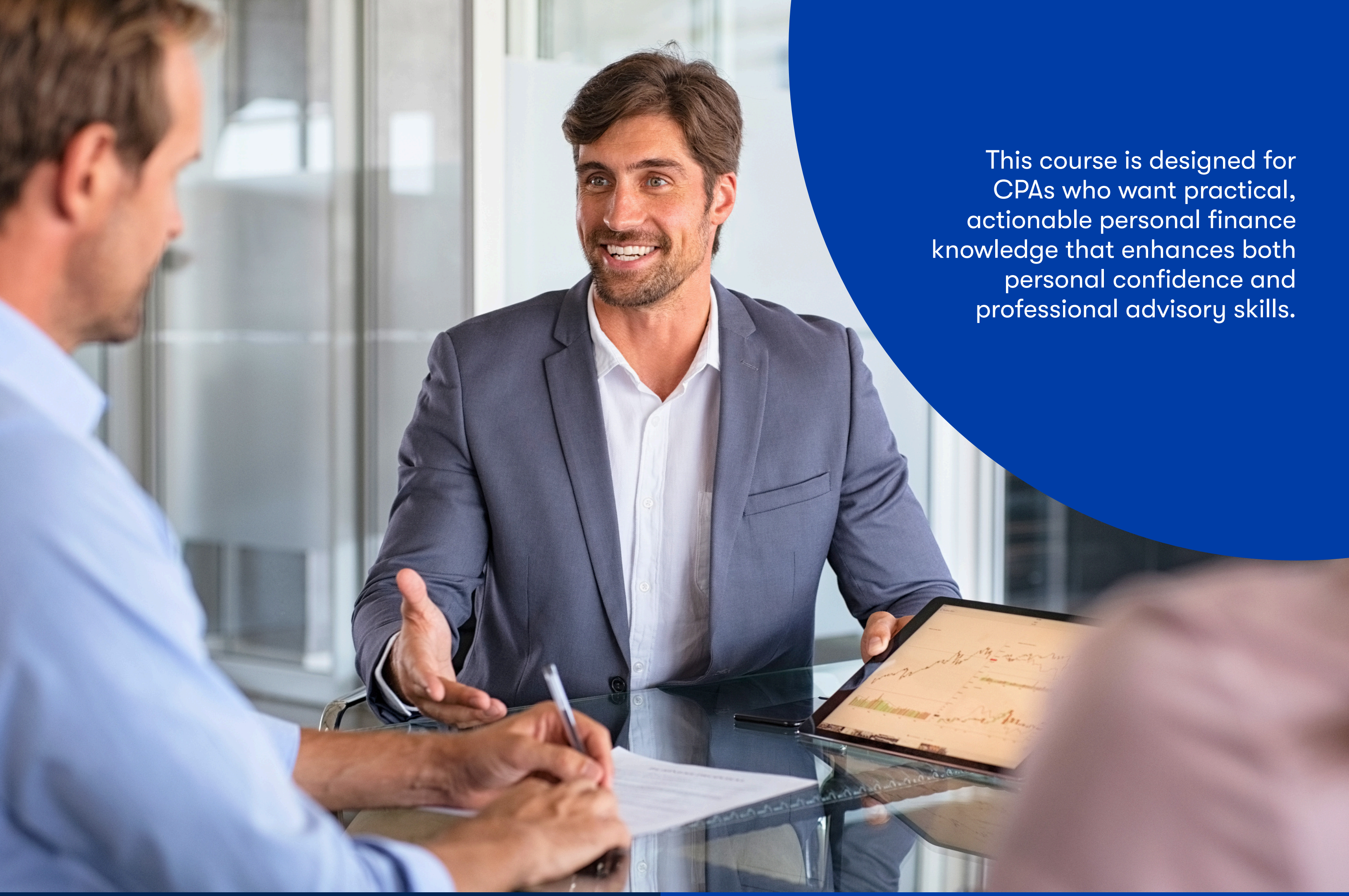
The course emphasizes ethical boundaries and clear communication, enabling CPAs to better navigate their own financial journeys while enhancing their ability to support clients and households through everyday financial decisions and life transitions.

10 PD Hours

PERSONAL FINANCE FOR CPAs

CERTIFICATE PROGRAM

CPA ONTARIO



This course is designed for CPAs who want practical, actionable personal finance knowledge that enhances both personal confidence and professional advisory skills.

Certificate Topics

- Personal financial mindset and goal setting.
- Budgeting, cash flow, and early-career debt strategies.
- Emergency savings and investment fundamentals (TFSA, RRSP, non-registered).
- Tax planning considerations for life and CPA career stages.
- Client-centred financial profiling and communication tactics.
- Helping clients manage debt, investments, and transitions.
- Family financial planning: milestones, risk management, retirement.
- Estate planning fundamentals and intra-family financial conversations.

Who Will Benefit

- **New and early-career CPAs.**
- **CPAs in business, finance, taxation, and advisory roles.**
- **Practitioners working with individuals and small business clients.**
- **CPAs seeking to expand their personal and professional conversations beyond traditional technical topics.**

Key Takeaways

Upon completion of this certificate, participants will:

- Take control of your personal finances with a CPA-focused framework
- Elevate everyday client conversations into high-value advisory moments
- Simplify complex financial concepts into clear, actionable guidance for your clients.
- Strengthen your value as a trusted, well-rounded financial advisor.
- Navigate advisory boundaries with confidence and professional clarity
- Build, protect, and transfer wealth across your family's life stages

Meet Your Instructor

Nelson Soh, CPA, CA

As a Chartered Professional Accountant (CA, ex-KPMG), Nelson is a Managing Partner at FSQ Consulting in Vancouver. He has spent his career doing two things: helping businesses scale profitably and making financial literacy knowledge accessible to all.

Since 2020, his team at FSQ has helped multiple companies reach seven-figure profitability, grow tenfold, and navigate successful exits. But it's the second part of his mission that sets him apart. His TEDx talk on financial literacy has reached over 1/4M viewers organically. His work across social media, schools, writing best-selling books, and speaking engagements has helped reach more than one million people to build a stronger relationship with money.

In 2024 alone, he spoke to more than 2,000 students in person across Metro Vancouver. In 2025, CPABC recognized Nelson with its Early Achievement Award, an honour given to CPAs who bring distinction to the profession through leadership, impact, and service. He lives and works in Vancouver, and genuinely believes that financial empowerment is one of the most powerful forces for change in the world.

Have Questions? Speak to an Advisor.

To speak to one of our advisors, please fill out this form.

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