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Education

Charles Kowal, CPA (retired) has received the AICPA's 2021 Personal Financial Planning (PFP) Distinguished Service Award, Martin 'Marty' Finn, CPA/PFS was presented the Sidney Kess Award for Excellence in Continuing Education, and David Greene, CPA was ..

Aug. 04, 2021



Three individual honors were handed out last week by the American Institute of CPAs (AICPA) at AICPA & CIMA ENGAGE 2021. Charles Kowal, CPA (retired) has received the AICPA's 2021 Personal Financial Planning (PFP) Distinguished Service Award, Martin 'Marty' Finn, CPA/PFS was presented the Sidney Kess Award for Excellence in Continuing Education, and David Greene, CPA was awarded the P. Thomas Austin Personal Financial Planning (PFP) Scholarship.

Personal Financial Planning Distinguished Service Award

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PFP Legislation and Regulations Sub-Committee, Co-Chair of the PFP Advisory Task Force, and as a member of the Responsibilities in PFP Services Task Force, PFP Services Standards Review Task Force, PFP Legislative/Regulatory Task Force, and PFP Fiduciary Task Force. His official volunteerism service for AICPA began in 1989, spanning more than 30 years.

“Charles Kowal has made a tremendous impact upon the role of CPAs in personal financial planning through his volunteer service through the years,” said Dan Snyder, CPA/PFS, director of personal financial planning at the Association of International Certified Professional Accountants representing AICPA & CIMA. “As an advocate for CPAs and their role providing planning services, Charles has paved the way for the future generations of CPA financial planners.”

Kowal led the charge when financial planning regulation was threatened in the 1980s and testified on behalf of AICPA before a Congressional hearing on proposed financial planner/investment adviser legislation in the 80s. He has been involved more recently with advocating for clarity to SEC IA-1092, commenting on SEC's Reg BI and advertising rules, and positioning on financial planning regulation. He has made significant contributions to many initiatives including task forces charged with editing the Fiduciary handbooks, creating and updating the Statements on Responsibilities in Personal Financial Planning Practice first promulgated in the 1990's, and leadership around acquiring standard setting authority for the PFP Division in 2012 which led to issuance of the AICPA's Statement on Standards in Personal Financial Planning Services.

Sidney Kess Award for Excellence in Continuing Education

Martin Finn, CPA/PFS is the recipient of the AICPA's 2021 Sidney Kess Award for Excellence in Continuing Education. The award was presented at AICPA & CIMA ENGAGE. Finn is the Founding Partner of Lavelle & Finn, LLP. He also currently

teaches as an Adjunct Professor at Schenectady County Community College. He has

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conferences. It is my honor and pleasure to see my friend and colleague Marty Finn receive the 2021 Sid Kess Award.”

In addition to being a longtime member of the AICPA PFP and Tax section, he is a member of the New York State Society of Certified Public Accountants, National Academy of Elder Law Attorneys, New York State Bar Association, Albany County Bar Association, and Estate Planning Council of Eastern New York.

The award, created in honor of Kess, recognizes CPAs who have made significant and outstanding contributions in tax and financial planning and whose public service exemplifies the CPA profession's values and ethics. Nominations for the Kess Award are solicited by the Tax Strategies for the High-Income Individual Conference Steering Committee and are accepted from May 31 – January 31. The Committee determines Award recipients.

P. Thomas Austin Personal Financial Planning Scholarship

The American Institute of CPAs announced today that David Greene, CPA, has been awarded the 2021 P. Thomas Austin Personal Financial Planning (PFP) Scholarship at the AICPA's Advanced Estate Planning Conference, part of AICPA & CIMA ENGAGE.

David Greene, CPA, is Senior Trust Officer at First Covenant Trust & Advisors, LLC in Johnson City, TN

Greene's work helps clients care for their families when they're not able to do so themselves, developing plans that afford them a peace of mind that their wishes will be carried out. Greene advises clients on tax-efficient wealth transfers, business succession strategies, asset protection devices. Leveraging a strong understanding of tax compliance, he has demonstrated the ability to develop tax-efficient plan from a fiduciary's standpoint. He has significant experience working with wills and trusts

and administering estate plans. “David Greene understands that when clients are

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Estate Planning Conference for three decades and is currently chair emeritus. Austin specializes in estate and financial planning. Formerly with Ernst & Young (now EY), he serves as a consultant to CPA firms, law firms, and professional organizations.

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