

5 Mistakes Made by Investors

CPA Wealth PROVIDER[®]

January 2007 For a Successful Financial Planning Practice[®]

4th Annual Financial Planning Awards

WE'RE IN
THE MONEY

THE IRS COMES
DOWN ON PATS

HOW WALL ST
STACKS THE CARDS

A Supplement to
ACCOUNTING TODAY
ACCOUNTING TECHNOLOGY
PRACTICAL ACCOUNTANT

Achievement

CPA Wealth Provider is proud to present the fourth annual financial planning awards honoring CPA/financial planning firms, broker/dealers, and financial planning software vendors as well as providing special Awards of Excellence to those who are in the vanguard of leadership in financial planning. The winners are those firms or companies that have taken the lead through innovation, efficiency, initiative, or growth in the financial planning area.

The chief editors of *Accounting Today*, *CPA Wealth Provider*, *Practical Accountant*, and WebCPA, judged the 50+ nominations received. The winners, along with honorable mentions, are detailed in these pages.



Software Vendors

CCH

Riverwoods, Ill.

The company has created a comprehensive one-stop electronic resource with its Wealth Management Library, a powerful research and practice aid that helps professionals understand clients' goals and create winning strategies. Designed specifically for accountants, the Library covers investment planning, individual tax planning, executive compensation, retirement planning, transfer tax and post-mortem planning, asset protection, and life insurance.



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