

Curriculum Vitae

David A. Pickler

Esq., CFP[®], ChFC[®], CDFA[®], CPWA[®], CPFA, CTEP, CAP[®], AEP[®]



Pickler Wealth Advisors
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www.picklerwealthadvisors.com

RELEVANT EXPERIENCE

Pickler Wealth Advisors <i>CEO and President</i>	<i>2005-Present</i>
The Pickler Law Firm <i>Senior Managing Partner</i>	<i>1986-Present</i>
Pickler Accounting Advisors <i>Partner</i>	<i>2011-Present</i>
American Public Education Foundation <i>Executive Director, Founder</i>	<i>2011-Present</i>

OTHER EXPERIENCE

International Paper <i>Personnel Analyst</i>	<i>1980-1981</i>
Xerox Corporation <i>High Volume Marketing Executive</i>	<i>1981-1984</i>
PaineWebber <i>Senior VP of Investments</i>	<i>1984-1987</i>
E.F. Hutton & Co./ Smith Barney <i>Senior VP of Investments</i>	<i>1987-1994</i>

PaineWebber/ UBS Financial Services	1994-2005
<i>Senior VP of Investments</i>	
<i>Branch Sales Manager</i>	

EDUCATION & TRAINING

Arkansas State University	
Bachelor of Science in Business Management	Jonesboro, AR
<i>Magna Cum Laude</i>	1980

The University of Memphis, Cecil C. Humphreys School of Law	
Juris Doctor	1985

The College for Financial Planning	Denver, CO
<i>Certified Financial Planner Training (Self Study)</i>	1988

The American College of Financial Services	Bryn Mawr, PA
<i>Chartered Financial Consultant</i>	1988
<i>Chartered Advisor in Philanthropy (CAP)</i>	2021

University of Pennsylvania, Wharton School of Business	
<i>"Retirement, Income, and Investment Strategies" Certification</i>	1995

Yale University	
<i>"Certified Private Wealth Advisor" Certification</i>	2020

University of Pennsylvania, Wharton School of Business	
<i>"Client Psychology" Certification</i>	2021

CERTIFICATIONS AND DEGREES HELD

<i>Bachelor of Science in Business Management</i>	1980
<i>Juris Doctor (J.D.)</i>	1985
<i>Arkansas Real Estate Affiliate Broker (Retired)</i>	1976-1981
<i>Series 03 National Commodity Futures Examination</i>	1984-Present
<i>Series 07 General Securities Representative Examination</i>	1984-Present
<i>Series 63 Uniform Securities Agent State Law Examination</i>	1984-Present
<i>Tennessee Insurance Agent</i>	1984-Present
<i>Insurance License for Annuity and Life</i>	1984-Present
<i>Certified Financial Planner (CFP)</i>	1988-Present
<i>Chartered Financial Consultant (CbFC)</i>	1990-Present
<i>Registered Investment Advisor</i>	1990-Present
<i>Series 65 Uniform Investment Adviser Law Examination</i>	1992-Present
<i>Series 05 Interest Rate Options Examination</i>	1996-Present
<i>Series 08 General Securities Sales Supervisor Examination</i>	1996-Present
<i>Certified Divorce Financial Analyst (CDFA)</i>	2015-Present

<i>Behavioral Finance</i>	2018-Present
<i>Certified Private Wealth Advisor (CPWA)</i>	2020-Present
<i>Chartered Trust and Estate Planner (CTEP)</i>	2020-Present
<i>Certified Plan Fiduciary Advisor (CPFA)</i>	2020-Present
<i>Accredited Estate Planner</i>	2021-Present
<i>Chartered Advisor in Philanthropy (CAP)</i>	2021-Present
<i>Rule 31 Mediator</i>	2021-Present
<i>Accredited Estate Planner® (AEP®)</i>	2021-Present

**DAVID A. PICKLER ATTORNEY AT LAW:
STATES OF PRACTICE AND MEMBERSHIP**

Admitted to practice in states of Tennessee, Mississippi, and Arkansas

Rule 31 Mediator

Tennessee Alternative Dispute Commission 2021

U.S. Supreme Court

Member 2004

U.S. Federal Courts

Member 1986

EXPERT WITNESS TESTIMONIES & PRESENTATIONS

Judicially Appointed Special Master,

Hodges v. Hodges 1997

Weiss v. Weiss 2000

Expert Witness,

Massey v. Massey 1992

Dodge v. Dodge 1993

Hardin v. Hardin 2003

Jennings v. Jennings 2015

Macdonald v. Macdonald 2015

Private Mediation of Divorce (Division of Assets),

Chandler v. Chandler 2011

Thompson v. Thompson 2014

Hermann v. Hermann 2015

Carney-Wright v. Wright 2015

Shappley v. Shappley 2017

Schwartz v. Schwartz 2019

Soule v. Soule 2019

Rule 31 Mediator 2021

Congressional Testimony,

Testimony of David A. Pickler, President of the National School Boards Association

Before the Subcommittee on Labor, Health and Human Services, Education, and

Related Agencies | Committee on Appropriations | United States House of Representatives 2014

Pickler Companies Presentations,

“Organizing Your Financial Past, Present, and Future”

“Your Financial Flight Plan”

“Planning for Perils, Pitfalls, and Panics”

“Tackling Bad Debt & Recognizing Better Debt”

“What now? Retirement and Your Second Career”

“Preparing for Tax Time Year-Round”

“Money and Your Family”

“Credit Survival”

“Fall Investor’s Market Almanac: Time to Harvest Your Profit or Plant New Seeds”

“Covering Your Assets: A Guide to Protecting Your Family Wealth from Issues of Age and Incapacity”

“Quarterly Market Update,” quarterly presentations for Market and a Movie

“Bull Talk,” quarterly Client Advisory Council calls

“Bull Talk,” Special Edition Weekly Market Calls | Coronavirus Updates

“BullTV” Host: Produced by Pickler Wealth Advisors and Collierville High School – Q1 of 2021

“The 2020 Election and Beyond: A Virtual Forum About the November Election”

“The Ultimate Guide to Planned Giving” – CLE Presentation for the Cecil C. Humphreys School of Law

“Four Things Small Business Owners Should Focus On” – Presentation for SCORE of Memphis

“Tax Planning for Small Businesses” – Presentation for SCORE of Memphis

“Tales from the Crypt-o: A Virtual Forum About Cryptocurrency”

National Presentations,

“President’s Inaugural Address” - NSBA Annual Conference

“Building an Army of Advocates” - NSBA Advocacy Institute

“President’s Report” - NSBA Annual Conference

“The Never-Ending Journey: On the Road from Good to Great” - LPL Financial Focus Conference

“The Relentless Pursuit of Relevance in Public Education”

“The Case for Financial Literacy” – Destination Imagination Annual Conference

PUBLIC SPEAKER

David has traveled to all 50 states and 9 countries as a professional speaker, advocating for public education on behalf of the National School Boards Association (NSBA) and American Public Education Foundation (APEF).

David is also a contributor on [Huffington Post](https://www.huffpost.com), authoring pro-public education articles:

- *Will America’s Head-Spinning Presidential Race Hinge on Character?*
- *Will this Year’s ‘Wild Ride’ Presidential Election Impact Youth Civic Engagement?*
- *Advancing Global Citizenship among K-12 Youth: A National Imperative*
- *The DNC’s ‘Stain’ of Corruption & the Lesson for America’s Youth*
- *The RNC’s ‘Great Lie’ About K-12 Education*
- *Common Core: A Failed ‘Grand Experiment’*
- *Make Public Education Part of Our National Dialogue*
- *K-12 Education for Sale - Buying and Selling Kids’ Futures*

PUBLICATIONS

<i>“Memphis, Profiles in Courage”</i>	2008
<i>“My Two Cents: Weekly Newsletter”</i>	2012-Present
<i>“Empowering Excellence”</i>	2013
<i><u>“Give Input on New Tennessee Education Standards”</u></i>	2015
<i><u>“Completion Grants Could Help Community College Students Stay on Track”</u></i>	2021
<i>“Pillars of Purpose”</i>	Pending Publication: 2021
<i>“Hostile Surrender”</i>	Pending Publication: 2022
National Publication Collaboration	
<i>“Shelby County Schools: Merger/Demerger” Washington Post; Laura Meckler</i>	2021
<i>“Shelby County Schools: Merger/Demerger” USA Today; Laura Testino</i>	2021

PROFESSIONAL ASSOCIATIONS, MEMBERSHIPS AND ACTIVITIES

Bar Associations

American Bar Association
Tennessee Bar Association
Memphis Bar Association
Mississippi Bar Association
Arkansas Bar Association
Planned Giving Council of Memphis
Estate Planning Council of Memphis

Collierville Chamber of Commerce

- Board of Directors
- Chair, Entrepreneurship Committee

Tennessee Financial Associations

<i>Member – Securities Dealers Association</i>	1984-1987
<i>President – International Association for Financial Planners, Memphis Chapter</i>	1993-1995
<i>Founder – Smart Money Expo</i>	1994-1995
<i>Member of Executive Board - Planned Giving Council of Greater Memphis</i>	2005-2008
<i>Member - Financial Planning Association (Local and National)</i>	2010-2017

Economic Club of Memphis

<i>Member</i>	2002-Present
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Germantown Chamber of Commerce:

<i>Chairman, Education Committee</i>	1998-2000
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National Science Teachers Association

<i>Member – Investment Advisory Committee</i>	1998
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CIVIC ASSOCIATIONS, MEMBERSHIPS AND ACTIVITIES

Boy Scouts of America

<i>CubMaster, Pack 368</i>	1992-1995
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<i>Eastern District Finance Director</i>	1995-1997
<i>Assistant Scout Master</i>	1995-2002
<i>Chickasaw Council Advisory Board</i>	1997
<i>Staff, BSA National Jamboree</i>	1997, 2001, 2005
<i>Chickasaw Council Executive Board</i>	1998-2018
<i>Vice Chairman – Scout Base</i>	2000
<i>Philmont Scout Ranch, Trek</i>	2000
<i>Eastern District Friends of Scouting Chairman</i>	2001
<i>2001 National Jamboree Committee - Chickasaw Council</i>	2001
<i>Vice President – Programs, Chickasaw Council</i>	2001-2004
<i>Selection Committee– Chickasaw Council Scout Executive</i>	2002
<i>ScoutBase Chairman</i>	2002, 2004, 2006, 2008
<i>Council Scout Division Finance Chair</i>	2003
<i>2005 National Jamboree Committee - Chickasaw Council</i>	2005
<i>Vice President – Finance, Chickasaw Council</i>	2005-2008
<i>Eastern District Chairman</i>	2018

Kiwanis

Louisiana-Mississippi-West Tennessee District

<i>District Special Education Committee</i>	2002-2003
<i>Chairman, Public Relations Committee</i>	2004
<i>Lt. Governor, Division 1C (Distinguished)</i>	2004-2005
<i>Board of Directors</i>	2004-2005
<i>Regional Trustee</i>	2005-2006
<i>Governor Elect</i>	2006-2007
<i>Governor</i>	2007-2008
<u><i>Kiwanis Club of Germantown</i></u>	
<i>Past President (Distinguished)</i>	2001-2002

Memphis Oral School for the Deaf

<i>Board of Directors</i>	2001-2013
<i>Capital Campaign, Chairman</i>	2002-2007
<i>Vice President, Finance</i>	2005
<i>Vice Chairman</i>	2005-2007
<i>Chairman</i>	2007-2013

Tennessee School Boards Association

<i>Level Five Master Board Member</i>	2001
<i>2001 All-Tennessee School Board</i>	2001
<i>Editorial Advisory Board</i>	2002-2003
<i>Treasurer</i>	2006-2007
<i>Executive Board of Directors</i>	2006-2015
<i>2007 All-Tennessee School Board</i>	2007
<i>Scholar's Circle - Recognizing Excellence in Boardmanship</i>	2007
<i>C. Hal Henard School Board Member of the Year</i>	2007

<i>President – Elect</i>	2007-2008
<i>President</i>	2009

Leadership Germantown Alumni Association

<i>Co-Founder</i>	1996
<i>Vice President</i>	1996 - 1998
<i>Founder, Germantown Community Forum Series</i>	1998
<i>President</i>	1998-2000

Defenders of Freedom

David provided leadership to this organization of Constitutional Conservatives, helping it establish organizational stability, broaden its membership base, and create a powerful niche in the area’s political infrastructure.

<i>Executive Vice President</i>	2003
<i>President</i>	2004-2005

City of Germantown, Tennessee

<i>Financial Advisory Committee</i>	1995-1996
<i>Design Review Commission</i>	1997-1998
<i>Economic Development Commission</i>	1999
<i>Chairman, George Washington Bicentennial Celebration</i>	1999
<i>Germantown 2000 Oversight Commission</i>	2000
<i>Steering Committee Hometown Heroes</i>	2000
<i>Planning Commission</i>	2000-2002
<i>Healthy Kids, Healthy Germantown Leadership Coalition</i>	2007

Greater Memphis Arts Council

<i>Steering Committee</i>	2003
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Leadership Memphis

<i>Class of 2001</i>	2001
<i>Education Day, Co-Chair</i>	2002-2003
<i>Education Committee</i>	2002-2004

Memphis Youth Performing Arts Association

<i>Chairman, Board of Directors</i>	2002-2003
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Mid-South AIDS Fund

<i>Board of Directors</i>	2003-2004
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Parent Teacher Association (PTA)

<i>Fall Carnival Chairperson</i>	1992-1999
<i>Project Coordinator, Farmington Educational Garden</i>	1997-1999
<i>Houston Middle School PTA Board</i>	1997-1998, 2002-2003

Shelby County Government

<i>Shelby County Board of Education</i>	1998-2014
<i>Shelby County Board of Education, Chairman</i>	1999-2011

<i>Ad Hoc Committee on Public Education and Long Term Financing</i>	2001
<i>Mayor's Task Force on School Funding and Metropolitan Governments</i>	2002
<i>Shelby County Needs Assessment Committee</i>	2004-2007
<i>Community Task Force on Public Education</i>	2005-2007
<i>Juvenile Court Advisory Council</i>	2006-2007
State of Tennessee	
<i>Coalition of Large School Systems, Chairman</i>	2006-2009
<i>TN Committee on Academic Standards, Vice Chairman</i>	2015-2017
United States Senate	
<i>IDEA Advisory Committee,</i>	
<i>US Senators Bill Frist and Lamar Alexander</i>	2002-2003
National School Boards Association (NSBA)	
<i>Southern Region Director</i>	2008
<i>Board of Directors</i>	2008-2015
<i>President</i>	2013-2014
<i>Immediate Past President</i>	2014-2015
Council of School Attorneys	
<i>Member, Tennessee & National</i>	2010-Present
Sons of the American Revolution	
<i>Member</i>	2010-Present
U.S. Supreme Court Historical Society	
<i>Member</i>	2013-Present
American Public Education Foundation (APEF)	
<i>Co-Founder and Executive Director</i>	2014-Present
Go the Distance Baseball ("Field of Dreams" Movie Site)	
<i>Board of Directors</i>	2014-Present
Krewe of Orpheus	
<i>Member</i>	2015-Present
Balboa Yacht Club	
<i>Member</i>	2016-Present
Financial Services Institute (FSI)	
<i>National Advisory Board</i>	2017-2019
National Board for Professional Teaching Standards (NBPTS)	
<i>Board of Directors</i>	2018-Present

Arlington Education Business Partnerships Foundation (EBP)	
<i>Chairman</i>	2018-2020
Orpheum Theatre	
<i>Board of Directors</i>	2005-2013
	<i>Second Term: 2018-Present</i>
<i>Chair, Strategic Planning Committee</i>	2018-Present
<i>Chair, Executive Committee</i>	2018-Present
<i>Planned Giving Advisor</i>	2020-Present
Federal Reserve Bank of St. Louis	
<i>Member, Advisory Committee</i>	2018-Present
Tennessee Business Roundtable (TBR)	
<i>Board of Directors</i>	2018-Present
<i>Chairman, Education Council</i>	2019-Present
The Federalist Society	
<i>Member</i>	2019-Present
Arkansas State University Foundation	
<i>Board of Directors</i>	
<i>Joint Committee for University Investments (Systemwide)</i>	2019-Present
Porter-Leith Early Childhood Foundation	
<i>Board of Trustees</i>	May 2021-Present
Cecil C. Humphreys School of Law	
<i>Dean's Advisory Committee</i>	June 2021-Present
<u>EDUCATION INITIATIVES</u>	
Partners in Education (PIE)	
<i>Board of Directors</i>	2016-Present
Houston High School Arts and Athletics Foundation (HHSAAF)	
<i>Board of Directors</i>	2015-Present
<i>Board Chairman</i>	2020-Present
Houston High School Master Plan	
<i>Committee Chairman</i>	2020-Present

PLANNED GIVING

Orpheum Theatre

Consultant

2020-Present

University of Memphis, Cecil C. Humphreys School of Law

Consultant

2020-Present

PHILANTHROPY

Legacy Interest

Collierville High School (Pickler Auditorium)

Collierville High School Stadium (Scoreboard)

Houston High School (Pickler Band Centre, Pickler Centre for the Performing Arts)

Houston High School Stadium (Scoreboard)

Memphis Oral School for the Deaf (Pickler Hall)

Tennessee School Boards Association (Pickler Conference Center)

Boy Scouts of America, Chickasaw Council (David A. Pickler Council Ring at Camp Carrier)

Germantown Education Foundation (Speed Sign Dedicated to Pickler Companies)

The Orpheum Theatre Broadway Club (Memphis, TN)

CAPITAL CAMPAIGNS

Chickasaw Council Boy Scouts

2002

Memphis Oral School for the Deaf (MOSD)

2002-2007

Houston High Band

2004-2007

Tennessee School Boards Association (TSBA)

2007-2008

National School Boards Association (NSBA)

2007-2009

Orpheum Theatre

2011-2014

Houston High School Arts & Athletics Foundation

2016-2017

Partners in Education

2017-2018

Houston High School

2021

HONORS AND AWARDS

Forbes,

Best-in-State Wealth Advisor

2019-2021

Invest in Others Foundation,

Catalyst Award, Winner

2019

***The Commercial Appeal's* Memphis Most Awards,**

Best Law Firm in Memphis

2019, 2020

***The Commercial Appeal's* Memphis Most Awards,**

Favorite Wealth Advisor

2020

Financial Times Top 400 Advisors List,

The Financial Times

2015

Kiwanis International Foundation Centennial Award,

Kiwanis International

2015

Walter Zeller Fellow,

<i>Kiwanis, LA-MS-West TN District</i>	2015
Five Star Award, <i>Five Star Professional</i>	2008-Present
National School Board Member of the Year Bammy Award, <i>Academy of Education Arts and Sciences</i>	2013
America's Top 1,000 Financial Advisors Award, <i>Barron's Magazine</i>	2011, 2012
Distinguished Service Award, <i>National School Boards Association</i>	2002, 2005, 2009, 2012
The Educator's Voice Bammy Award, <i>The Academy of Education Arts and Sciences</i>	2012
The National Altruism Award, <i>WealthManagement.com (formerly Registered Rep)</i>	2011
Diamond Lifetime Achievement Award, <i>Tennessee School Boards Association</i>	2004-2010
MOSD Hall of Fame, Charter Member <i>Memphis Oral School for the Deaf</i>	2009
Hixson Ambassador, <i>Kiwanis International</i>	2008
National Lifetime Achievement Award, <i>Parent Teacher Association</i>	2008
Charter Member of the Scholar's Circle, <i>Tennessee School Boards Association</i>	2007
C. Hal Henard Distinguished Service Award, <i>Tennessee School Boards Association</i>	2007
John T. Roberts Fellow, <i>Kiwanis, LA-MS-West TN District</i>	2006
Outstanding Lt. Governor Award, <i>Kiwanis, LA-MS-West TN District</i>	2004-2005
Silver Beaver Award, <i>Boy Scouts of America</i>	2004
River of Life Fellow, <i>Kiwanis, LA-MS-West TN District</i>	2004
George F. Hixson Fellow, <i>Kiwanis International</i>	2004
Germantown Citizen of the Year, <i>The Germantown Lions Club</i>	2004
District Award of Merit, <i>Boy Scouts of America</i>	2002
James E. West Fellow, <i>Boy Scouts of America</i>	2002
Outstanding School Board Member for the State of Tennessee, <i>Tennessee Congress of PTAs</i>	2001-2002
Golden Eagle Award, <i>Boy Scouts of America</i>	2001

Master Board Member,
Tennessee School Boards Association

2001