



*Curriculum Vitae*

**David A. Pickler**

J.D., CFP®, ChFC®, CDFA®, CPWA®, CPFA, CTEP, CAP®, AEP®, IPA, CEPA, VA Accredited Attorney



**RELEVANT EXPERIENCE**

<b>Pickler Wealth Advisors</b> <i>CEO and President</i>	<i>2005-Present</i>
<b>Pickler Law</b> <i>Senior Managing Partner</i>	<i>1986-Present</i>
<b>Pickler Accounting</b> <i>Partner</i>	<i>2011-Present</i>
<b>APEF</b> <i>Founder, Chairman of the Board</i>	<i>2014-Present</i>

**OTHER EXPERIENCE**

<b>International Paper</b> <i>Personnel Analyst</i>	<i>1980-1981</i>
<b>Xerox Corporation</b> <i>High Volume Marketing Executive</i>	<i>1981-1984</i>
<b>PaineWebber</b> <i>Senior VP of Investments</i>	<i>1984-1987</i>
<b>E.F. Hutton &amp; Co./ Smith Barney</b> <i>Senior VP of Investments</i>	<i>1987-1994</i>
<b>PaineWebber/ UBS Financial Services</b> <i>Senior VP of Investments</i> <i>Branch Sales Manager</i>	<i>1994-2005</i>

## **EDUCATION & TRAINING**

### **Arkansas State University**

Bachelor of Science in Business Management  
*Magna Cum Laude*

Jonesboro, AR  
1980

### **The University of Memphis, Cecil C. Humphreys School of Law**

Juris Doctor

1985

### **The College for Financial Planning**

*Certified Financial Planner Training (Self Study)*

Denver, CO  
1988

### **The American College of Financial Services**

*Chartered Financial Consultant*  
*Chartered Advisor in Philanthropy (CAP)*

Bryn Mawr, PA  
1988  
2021

### **University of Pennsylvania, Wharton School of Business**

*"Retirement, Income, and Investment Strategies" Certification*

1995

### **Yale University**

*"Certified Private Wealth Advisor" Certification*

2020

### **University of Pennsylvania, Wharton School of Business**

*"Client Psychology" Certification*

2021

## **CERTIFICATIONS AND DEGREES HELD**

*Bachelor of Science in Business Management*

1980

*Juris Doctor (J.D.), Cecil C. Humphreys School of Law, University of Memphis*

1985

*Arkansas Real Estate Affiliate Broker (Retired)*

1976-1981

*Series 03 National Commodity Futures Examination*

1984-Present

*Series 07 General Securities Representative Examination*

1984-Present

*Series 63 Uniform Securities Agent State Law Examination*

1984-Present

*Tennessee Insurance Agent*

1984-Present

*Insurance License for Annuity and Life*

1984-Present

*Certified Financial Planner (CFP)*

1988-Present

*Chartered Financial Consultant (CbFC)*

1990-Present

*Registered Investment Advisor*

1990-Present

*Series 65 Uniform Investment Adviser Law Examination*

1992-Present

*Series 05 Interest Rate Options Examination*

1996-Present

*Series 08 General Securities Sales Supervisor Examination*

1996-Present

*Certified Divorce Financial Analyst (CDFA)*

2015-Present

*Behavioral Finance*

2018-Present

*Certified Private Wealth Advisor (CPWA)*

2020-Present

*Chartered Trust and Estate Planner (CTEP)*

2020-Present

*Certified Plan Fiduciary Advisor (CPFSA)*

2020-Present

*Chartered Advisor in Philanthropy (CAP)*

2021-Present

<i>Rule 31 Listed Mediator</i>	2021-Present
<i>Accredited Estate Planner® (AEP®)</i>	2021-Present
<i>Certified Impact Philanthropy Advisor (Powered by Daylight)</i>	2025-Present
<i>Certified Exit Planning Advisor (CEPA)</i>	2025-Present

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

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

<b>Rule 31 Listed Mediator</b>	
<i>Tennessee Alternative Dispute Commission</i>	2021
<b>U.S. Supreme Court</b>	
<i>Member</i>	2004
<b>U.S. Federal Courts</b>	
<i>Member</i>	1986

**EXPERT WITNESS TESTIMONIES & PRESENTATIONS**

<b>Judicially Appointed Special Master,</b>	
<i>Hodges v. Hodges</i>	1997
<i>Weiss v. Weiss</i>	2000

<b>Expert Witness,</b>	
<i>Massey v. Massey</i>	1992
<i>Dodge v. Dodge</i>	1993
<i>Hardin v. Hardin</i>	2003
<i>Jennings v. Jennings</i>	2015
<i>Macdonald v. Macdonald</i>	2015

<b>Private Mediation of Divorce (Division of Assets),</b>	
<i>Chandler v. Chandler</i>	2011
<i>Thompson v. Thompson</i>	2014
<i>Hermann v. Hermann</i>	2015
<i>Carney-Wright v. Wright</i>	2015
<i>Shappley v. Shappley</i>	2017
<i>Schwartz v. Schwartz</i>	2019
<i>Soule v. Soule</i>	2019
<i>Stumph v. Stumph</i>	2024

<b>Congressional Testimony,</b>	
<i>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</i>	2014

<b>Pickler Companies Presentations,</b>	
<i>“Organizing Your Financial Past, Present, and Future”</i>	
<i>“Your Financial Flight Plan”</i>	

*“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,**

*“Pillars of Purpose” – TSBA Annual Conference, 2023*  
*“Public Private Partnerships” – TSBA Annual Conference, 2023*  
*“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](#), 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
<a href="#"><u>"Give Input on New Tennessee Education Standards"</u></a>	2015
<a href="#"><u>"Completion Grants Could Help Community College Students Stay on Track"</u></a>	2021
<a href="#"><u>"For Tennessee's students, proposed education funding formula makes the grade"</u></a>	2022
<a href="#"><u>"Pillars of Purpose: Leadership Lessons for Achieving a Life of Significance"</u></a> (Book)	2024
<a href="#"><u>"Why a purpose-driven practice has become a durable advantage in wealth management"</u></a> (InvestmentNews)	2026
<a href="#"><u>"Financial literacy as a path to opportunity"</u></a> (InvestmentNews)	2026
<i>"Hostile Surrender"</i> (Book)	Pending Publication: 2026

### **National Publication Collaboration**

<i>"Shelby County Schools: Merger/Demerger"</i> Washington Post; Laura Meckler	2021
<i>"Shelby County Schools: Merger/Demerger"</i> USA Today; Laura Testino	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, Governance 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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## **Collierville Chamber of Commerce**

<i>Member</i>	2005
<i>Executive Committee</i>	2025
<i>Governance Committee, Chair</i>	2024-Present

## **CIVIC ASSOCIATIONS, MEMBERSHIPS AND ACTIVITIES**

### **Boy Scouts of America**

<i>CubMaster, Pack 368</i>	1992-1995
<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, 2023
<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
<i>Council Vice President, Planned Giving</i>	2025-Present

### **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

<b>Memphis Youth Performing Arts Association</b> <i>Chairman, Board of Directors</i>	2002-2003
<b>Mid-South AIDS Fund</b> <i>Board of Directors</i>	2003-2004
<b>Parent Teacher Association (PTA)</b> <i>Fall Carnival Chairperson</i> <i>Project Coordinator, Farmington Educational Garden</i> <i>Houston Middle School PTA Board</i>	1992-1999 1997-1999 1997-1998, 2002-2003
<b>Shelby County Government</b> <i>Shelby County Board of Education</i> <i>Shelby County Board of Education, Chairman</i> <i>Ad Hoc Committee on Public Education and Long-Term Financing</i> <i>Mayor's Task Force on School Funding and Metropolitan Governments</i> <i>Shelby County Needs Assessment Committee</i> <i>Community Task Force on Public Education</i> <i>Juvenile Court Advisory Council</i>	1998-2014 1999-2011 2001 2002 2004-2007 2005-2007 2006-2007
<b>State of Tennessee</b> <i>Coalition of Large School Systems, Chairman</i> <i>TN Committee on Academic Standards, Vice Chairman</i>	2006-2009 2015-2017
<b>United States Senate</b> <i>IDEA Advisory Committee,</i> <i>US Senators Bill Frist and Lamar Alexander</i>	2002-2003
<b>National School Boards Association (NSBA)</b> <i>Southern Region Director</i> <i>Board of Directors</i> <i>President</i> <i>Immediate Past President</i>	2008 2008-2015 2013-2014 2014-2015
<b>Council of School Attorneys</b> <i>Member, Tennessee &amp; National</i>	2010-Present
<b>Sons of the American Revolution</b> <i>Member</i>	2010-Present
<b>U.S. Supreme Court Historical Society</b> <i>Member</i>	2013-Present
<b>APEF</b> <i>Founder and Chairman of the Board</i>	2014-Present

<b>Go the Distance Baseball (“Field of Dreams” Movie Site)</b> <i>Board of Directors</i>	2014-2024
<b>Field of Dreams</b> <i>National Advisory Council</i>	2024-Present
<b>Krewe of Orpheus</b> <i>Member</i>	2015-Present
<b>Balboa Yacht Club</b> <i>Member</i>	2016-Present
<b>Financial Services Institute (FSI)</b> <i>National Advisory Board</i>	2017-2019
<b>National Board for Professional Teaching Standards (NBPTS)</b> <i>Board of Directors</i>	2018-Present
<b>Arlington Education Business Partnerships Foundation (EBP)</b> <i>Chairman</i>	2018-2020
<b>Orpheum Theatre</b> <i>Board of Directors</i>	2005-2013 Second Term: 2018-Present
<i>Chair, Strategic Planning Committee</i>	2018-Present
<i>Executive Committee</i>	2018-Present
<i>Planned Giving Advisor</i>	2020-Present
<b>Federal Reserve Bank of St. Louis</b> <i>Member, Advisory Committee</i>	2018-Present
<b>Tennessee Business Roundtable (TBR)</b> <i>Board of Directors</i>	2018-Present
<i>Chairman, Education Council</i>	2019-Present
<i>Vice Chair</i>	2023
<i>Chair</i>	2024-Present
<b>The Federalist Society</b> <i>Member</i>	2019-Present
<b>Arkansas State University Foundation</b> <i>Vice Chair</i>	2023
<i>Board of Directors</i>	
<i>Joint Committee for University Investments (Systemwide)</i>	2019-Present

**Porter-Leath Early Childhood Foundation**

*Vice Chair*

2023-Present

*Board of Trustees*

2021-Present

**Cecil C. Humphreys School of Law**

*Dean’s Advisory Committee*

2021-Present

**InvestmentNews**

*National Board Member*

2025-Present

*Expert Advice Advisor Committee*

2025-Present

**EDUCATION INITIATIVES**

**APEF**

*Founder and Chairman of the Board*

2014-Present

**Partners in Education (PIE)**

*Board of Directors*

2016-Present

**Houston High School Arts and Athletics Foundation (HHSAAF)**

*Board of Directors*

2015-Present

*Board Chairman*

2020-Present

**Houston High School Master Plan**

*Committee Chairman*

2020-Present

**PLANNED GIVING**

**Orpheum Theatre**

*Consultant*

2020-Present

**University of Memphis, Cecil C. Humphreys School of Law**

*Consultant*

2020-Present

**Chickasaw Council, Scouting America**

*Vice President, Planned Giving*

2025-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 Currier)  
 Germantown Education Foundation (Speed Sign Dedicated to Pickler Companies)  
 The Orpheum Theatre's Pickler Companies Broadway Club (Memphis, TN)  
 Porter-Leath, new headquarters  
 The Sultana Disaster Museum

## **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
The Sultana Disaster Museum	2023

## **HONORS AND AWARDS**

<b>Finalist: Advisor of the Year (Southeast Region), Financial Education Champion</b>	
<i>InvestmentNews Awards</i>	2026
<b>5-Star Wealth Management Team,</b>	
<i>InvestmentNews</i>	2026
<b>Hot List,</b>	
<i>InvestmentNews</i>	2026
<b>Luminaries with a Heart,</b>	
<i>ThinkAdvisor Luminaries</i>	2026
<b>Top Financial Professionals 2026,</b>	
<i>InvestmentNews</i>	2026
<b>5-Star Wealth Management Team,</b>	
<i>InvestmentNews</i>	2025
<b>Attorney for Justice: Pro Bono Service Award,</b>	
<i>Tennessee Supreme Court</i>	2025
<b>Pillar of Excellence,</b>	
<i>University of Memphis (Cecil C. Humphreys School of Law)</i>	2024
<b>100 Advisors to Watch (#9),</b>	
<i>Advisor Hub</i>	2024
<b>Top Advisor,</b>	
<i>InvestmentNews</i>	2024
<b>Charitable Champion, Invest in Others,</b>	
<i>Corporate Philanthropic Excellence Award Winner</i>	2022, 2023, 2024
<b>Luminaries (ThinkAdvisor),</b>	
<i>Community Impact, Finalist</i>	2022, 2023, 2024

<b>Forbes,</b> <i>Best-in-State Wealth Advisor (#7 in 2026)</i>	2019-2026
<b>Invest in Others Foundation,</b> <i>Catalyst Award, Winner</i>	2019
<b>The Commercial Appeal's Memphis Most Awards,</b> <i>Best Law Firm in Memphis</i>	2019-2023
<b>The Commercial Appeal's Memphis Most Awards,</b> <i>Best Financial Planner</i>	2023
<b>Financial Times Top 400 Advisors List,</b> <i>The Financial Times</i>	2015
<b>Kiwanis International Foundation Centennial Award,</b> <i>Kiwanis International</i>	2015
<b>Walter Zeller Fellow,</b> <i>Kiwanis, LA-MS-West TN District</i>	2015
<b>Five Star Award,</b> <i>Five Star Professional</i>	2008-Present
<b>National School Board Member of the Year Bammy Award,</b> <i>Academy of Education Arts and Sciences</i>	2013
<b>America's Top 1,000 Financial Advisors Award,</b> <i>Barron's Magazine</i>	2011, 2012
<b>Distinguished Service Award,</b> <i>National School Boards Association</i>	2002, 2005, 2009, 2012
<b>The Educator's Voice Bammy Award,</b> <i>The Academy of Education Arts and Sciences</i>	2012
<b>The National Altruism Award,</b> <i>WealthManagement.com (formerly Registered Rep)</i>	2011
<b>Diamond Lifetime Achievement Award,</b> <i>Tennessee School Boards Association</i>	2004-2010
<b>MOSD Hall of Fame, Charter Member</b> <i>Memphis Oral School for the Deaf</i>	2009
<b>Hixson Ambassador,</b> <i>Kiwanis International</i>	2008
<b>National Lifetime Achievement Award,</b> <i>Parent Teacher Association</i>	2008
<b>Charter Member of the Scholar's Circle,</b> <i>Tennessee School Boards Association</i>	2007
<b>C. Hal Henard Distinguished Service Award,</b> <i>Tennessee School Boards Association</i>	2007
<b>John T. Roberts Fellow,</b> <i>Kiwanis, LA-MS-West TN District</i>	2006
<b>Outstanding Lt. Governor Award,</b> <i>Kiwanis, LA-MS-West TN District</i>	2004-2005
<b>Silver Beaver Award,</b> <i>Boy Scouts of America</i>	2004
<b>River of Life Fellow,</b>	

<i>Kiwanis, LA-MS-West TN District</i>	2004
<b>George F. Hixson Fellow,</b> <i>Kiwanis International</i>	2004
<b>Germantown Citizen of the Year,</b> <i>The Germantown Lions Club</i>	2004
<b>District Award of Merit,</b> <i>Boy Scouts of America</i>	2002
<b>James E. West Fellow,</b> <i>Boy Scouts of America</i>	2002
<b>Outstanding School Board Member for the State of Tennessee,</b> <i>Tennessee Congress of PTAs</i>	2001-2002
<b>Golden Eagle Award,</b> <i>Boy Scouts of America</i>	2001
<b>Master Board Member,</b> <i>Tennessee School Boards Association</i>	2001