

*Curriculum Vitae*

**David A. Pickler, Esq., CFP<sup>®</sup>, ChFC<sup>®</sup>, CDFIA<sup>®</sup>**



Pickler Wealth Advisors  
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**RELEVANT EXPERIENCE**

<b>Pickler Wealth Advisors</b> <i>CEO and President</i>	<i>2005-Present</i>
<b>The Pickler Law Firm</b> <i>Senior Managing Partner</i>	<i>1986-Present</i>
<b>Pickler Accounting Advisors</b> <i>Partner</i>	<i>2011-Present</i>
<b>Pickler Insurance Associates</b> <i>Senior Partner</i>	<i>2014-Present</i>
<b>Memphis Divorce Financial Consultants</b> <i>Managing Partner</i>	<i>2016-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>

**PaineWebber/ UBS Financial Services**  
*Senior VP of Investments*  
*Branch Sales Manager*

1994-2005

## **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**

*Charter Financial Consultant*

Bryn Mawr, PA, 1988

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

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

Philadelphia, PA 1995

## **CERTIFICATIONS AND DEGREES HELD**

*Bachelor of Science in Business Management*

1980

*Juris Doctor (J.D.)*

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

## **EXPERT WITNESS TESTIMONIES & PRESENTATIONS**

### **Judicially Appointed Special Master,**

*Hodges v. Hodges*

1997

*Weiss v. Weiss*

2000

**Expert Witness,**

<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

**Private Mediation of Divorce (Division of Assets),**

<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

**Congressional Testimony,**

<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
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**Pickler Companies Presentations,**

2013-2017

<i>“Organizing Your Financial Past, Present, and Future”</i>
<i>“Your Financial Flight Plan”</i>
<i>“Planning for Perils, Pitfalls, and Panics”</i>
<i>“Tackling Bad Debt &amp; Recognizing Better Debt”</i>
<i>“What now? Retirement and Your Second Career”</i>
<i>“Preparing for Tax Time Year-Round”</i>
<i>“Money and Your Family”</i>
<i>“Fall Investor’s Market Almanac: Time to Harvest Your Profit or Plant New Seeds”</i>
<i>“Covering Your Assets: A Guide to Protecting Your Family Wealth from Issues of Age and Incapacity”</i>
<i>“Quarterly Market Update,” quarterly presentations for Client Advisory Council Calls and Market and a Movie</i>

**National Presentations,**

<i>“President’s Inaugural Address” - NSBA Annual Conference</i>	2013
<i>“Building an Army of Advocates” - NSBA Advocacy Institute</i>	2014
<i>“President’s Report” - NSBA Annual Conference</i>	2014
<i>“The Never-Ending Journey: On the Road from Good to Great” - LPL Financial Focus Conference</i>	2015
<i>“The Relentless Pursuit of Relevance in Public Education”</i>	2015
<i>“The Case for Financial Literacy” – Destination Imagination Annual Conference</i>	2016

**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 regular contributor on [Huffington Post](http://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**

*"Memphis, Profiles in Courage"* 2008  
*"Empowering Excellence"* 2013

## **PROFESSIONAL ASSOCIATIONS, MEMBERSHIPS AND ACTIVITIES**

### **Bar Associations**

*American Bar Association*  
*Tennessee Bar Association*  
*Memphis Bar Association*  
*Mississippi Bar Association*  
*Arkansas Bar Association*

### **Tennessee Financial Associations**

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

### **Economic Club of Memphis**

*Member* 2002-2017

### **Germantown Chamber of Commerce:**

*Chairman, Education Committee* 1998-2000

### **National Science Teachers Association**

*Member – Investment Advisory Committee* 1998

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

### **Boy Scouts of America**

*CubMaster, Pack 368* 1992-1995  
*Eastern District Finance Director* 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-Currently Serving
<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

### **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

#### Kiwanis Club of Germantown

<i>Past President (Distinguished)</i>	2001-2002
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### **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>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 areas 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

*Community Task Force on Public Education* 2005-2007  
*Juvenile Court Advisory Council* 2006-2007

**State of Tennessee**

*Coalition of Large School Systems, Chairman* 2006-2009  
*TN Committee on Academic Standards, Vice Chairman* 2015-2017

**United States Senate**

*IDEA Advisory Committee,*  
*US Senators Bill Frist and Lamar Alexander* 2002-2003

**National School Boards Association (NSBA)**

*Southern Region Director* 2008  
*Board of Directors* 2008-2015  
*President* 2013-2014  
*Immediate Past President* 2014-2015

**American Public Education Foundation (APEF)**

*Co-Founder and President* 2014-Present

**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

**HONORS AND AWARDS**

**Financial Times Top 400 Advisors List,**  
*The Financial Times* 2015

**Kiwanis International Foundation Centennial Award,**  
*Kiwanis International* 2015

**Walter Zeller Fellow,**  
*Kiwanis, LA-MS-West TN District* 2015

**Five Star Award,**  
*Five Star Professional* 2008-2017

**National School Board Member of the Year Bammy Award,**  
*Academy of Education Arts and Sciences* 2013

**America's Top 1,000 Financial Advisors Award,**  
*Barron's Magazine* 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>Advisor of the Year,</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>Kivanis 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>Kivanis, LA-MS-West TN District</i>	2006
<b>Outstanding Lt. Governor Award,</b> <i>Kivanis, 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>Kivanis, LA-MS-West TN District</i>	2004
<b>George F. Hixson Fellow,</b> <i>Kivanis 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