

Curriculum Vitae

David A. Pickler

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

RELEVANT EXPERIENCE

Pickler Wealth Advisors <i>CEO and President</i>	2005-Present
The Pickler Law Firm <i>Senior Managing Partner</i>	1986-Present
Pickler Accounting Advisors <i>Partner</i>	2011-Present
American Pillars Education Foundation <i>Executive Director, Founder</i>	2014-Present

OTHER EXPERIENCE

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

EDUCATION & TRAINING

Arkansas State University Bachelor of Science in Business Management <i>Magna Cum Laude</i>	Jonesboro, AR 1980
The University of Memphis, Cecil C. Humphreys School of Law Juris Doctor	1985
The College for Financial Planning <i>Certified Financial Planner Training (Self Study)</i>	Denver, CO 1988

The American College of Financial Services	<i>Bryn Mawr, PA</i>
<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 (ChFC)</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

<i>Admitted to practice in states of Tennessee, Mississippi, and Arkansas</i>	
Rule 31 Mediator	
<i>Tennessee Alternative Dispute Commission</i>	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,

“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](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

“Memphis, Profiles in Courage”	2008
“My Two Cents: Weekly Newsletter”	2012-Present
“Empowering Excellence”	2013
<u>“Give Input on New Tennessee Education Standards”</u>	2015
<u>“Completion Grants Could Help Community College Students Stay on Track”</u>	2021
<u>“For Tennessee’s students, proposed education funding formula makes the grade”</u>	2022
“Pillars of Purpose: Leadership Lessons for Achieving a Life of Significance”	2024
“Hostile Surrender”	Pending Publication: 2025

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, 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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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

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 Pillars 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

Board of Directors

2005-2013

Second Term: 2018-Present

Chair, Strategic Planning Committee

2018-Present

Chair, Executive Committee

2018-Present

Planned Giving Advisor

2020-Present

Federal Reserve Bank of St. Louis

Member, Advisory Committee

2018-Present

Tennessee Business Roundtable (TBR)

Board of Directors

2018-Present

Chairman, Education Council

2019-Present

Vice Chair

2023

Chair

2024

The Federalist Society

Member

2019-Present

Arkansas State University Foundation

Vice Chair

2023

Board of Directors

Joint Committee for University Investments (Systemwide)

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

EDUCATION INITIATIVES

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

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

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

AdvisorHub

100 Advisors to Watch (#9)

2024

InvestmentNews

Top Advisor

2024

Charitable Champion, Invest in Others

Corporate Philanthropic Excellence Award Winner

2022 and 2023

Luminaries, ThinkAdvisor

Community Impact, Finalist

2022 and 2023

Forbes,

Best-in-State Wealth Advisor

2019-2024

Invest in Others Foundation, <i>Catalyst Award, Winner</i>	2019
The Commercial Appeal's Memphis Most Awards, <i>Best Law Firm in Memphis</i>	2019-2023
The Commercial Appeal's Memphis Most Awards, <i>Best Financial Planner</i>	2023
Financial Times Top 400 Advisors List, <i>The Financial Times</i>	2015
Kiwanis International Foundation Centennial Award, <i>Kiwanis International</i>	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>Kivans 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, <i>Tennessee School Boards Association</i>	2001