

### **Harold R. Evensky, CFP®, AIF®**

Mr. Evensky is President of Evensky & Katz. Prior to forming his own company, he served as a Vice President of Investments with major investment banking firms. Mr. Evensky received his Bachelor's and Master's Degrees from Cornell University. He has been a featured speaker on investment topics at numerous national and international conventions, including the AICPA, the ICFP, the IAFP, College for Financial Planning, the American College, the American Society CLU and ChFC and the AAIL. Mr. Evensky has served as Chair of the TIAA-CREF Institute Advisory Board and is a member of the Financial Planning Association, the Academy of Financial Services, and the Association for Investment Management and Research, and is an associate member of the American Bar Association. He is past Chair of the International CFP® Council, the CFP® Board of Governors, the Board of Examiners and the Board of Appeals. Additionally, he has served as Chair of the Editorial Advisory board of the Asia Financial Planning Journal, a columnist for (cont'd on next page) Worth.com, the Editorial Advisory Board of the Journal of Financial Planning, and he is currently a contributing writer for Financial Advisor Magazine. He has also served on, the National Board of the IAFP and the Charles Schwab Institutional Advisory Board and Council.

In 2002, his paper "Changing Equity Premium Implications For Wealth Management Portfolio Design And Implementation" was selected as the winner of the Journal of Financial Planning, Planning Techniques and Methods, "Call for Papers" competition. In 1999, 2000 & 2001, he was named by Accounting Today, one of the professions most influential people. In 1999, he was awarded the Dow Jones Investment Advisor Portfolio Management Award For Lifetime Achievement, and in January of 2001 he was listed by Financial Planning magazine as one of five "Movers, Shakers and Decision Makers, The Most Influential People in the Financial Planning Profession." In March 2001, he was named one of the "25 Power Elite" in the financial services industry by Investment News.

Mr. Evensky has been recognized by Worth as one of the "Top 100 Wealth Managers" for five consecutive years. In 2006 he received the "Skip Viragh Award " for Industry Excellence. Mr. Evensky has participated as an arbitrator for the American Arbitration Association (AAA) and the National Association of Security Dealers (NASD). He has been a principal in his own broker-dealer firm and held NASD General Securities Principal and Municipal Securities Principal licenses.

An internationally recognized speaker on investment and financial planning issues, he has written for and is quoted frequently in the national press, and is the author of *Wealth Management*, published by McGraw/Hill and co-editor of *The Investment Think Tank, Theory, Strategy, and Practice for Advisers* (Bloomberg) and *Retirement Income Redesigned - Master Plans for Distribution* (Bloomberg).