Harold R. Evensky, CFP®

HAROLD EVENSKY, **CFP®**, **AIF®** is President of Evensky & Katz a fee only financial advisory firm based in Coral Gables, Florida . Prior to forming his own company, he served as a Vice President of Investments with major investment banking firms. Mr. Evensky received his Bachelors and Masters degrees from Cornell University.

He has served as Chair of the TIAA-CREF Institute Advisory Board, the International CFP Council, the CFP Board of Governors, the Board of Examiners, and the Board of Appeals and as a member of the National Board of the IAFP and the Charles Schwab Institutional Advisory Board and Council. He is an Adjunct Graduate Faculty at Texas Tech in the Personal Financial Planning Program, a member of the Financial Planning Association, the Academy of Financial Services, the CFA Institute and is an associate member of the American Bar Association. He is currently the Research Columnist for the *Journal of Financial Planning*, a contributing writer for *Financial Advisor Magazine*, the *Asian Financial Planning Journal* and a member of the Editorial Review Board of the *Journal of Financial Planning*.

Mr. Evensky has been frequently recognized by *Worth* as one of the top 100 Wealth Managers, by *Investment Advisor* as one of the 25 most influential people in the financial planning industry, by *Financial Planning Magazine* as one of five “Movers, Shakers and Decision Makers, The Most Influential People in the Financial Planning Profession,” *Investment News* named one of the “25 Power Elite” in the financial services industry and *Accounting Today* has regularly listed him as one the profession’s most influential people. In 2002, his paper “Changing Equity Premium Implications for Wealth Management Portfolio Design” won the *Journal of Financial Planning*, “Call for Papers” competition and in 1999, he was awarded the Dow Jones Investment Advisor Portfolio Management Award For Lifetime Achievement.

Mr. Evensky is an internationally recognized speaker on investment and financial planning issues. In addition, he has written for and is quoted frequently in the national press, and is the author of *Wealth Management* (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).