FPA OF WISCONSIN
FINANCIAL PLANNING ASSOCIATION

SPEAKER BIOGRAPHIES

Jimmy Williams

Jimmy Williams, CPA/PFS, CFP®, is the CEO/President of Compass Capital Management, LLC, a registered investment adviser and wealth management firm with offices in Tulsa and McAlester, Oklahoma. He specializes in creating plans for retirees and near-retirees to realize their bigger future by utilizing tax-efficient strategies in the areas of proactive retirement plan accumulation and distribution, estate preservation and cash flow planning. He is the incoming Chairman of the AICPA National Accreditation Commission. Jimmy has served as the treasurer and trustee on the AICPA Foundation. He is a past chairman of the OSCPA and completed a term as a member of the AICPA Board of Directors. Jimmy authors and teaches advanced financial planning techniques and ethics for the AICPA and the CPA Societies of Iowa, Nebraska, Montana, Texas and Oklahoma. Williams is often sought as an expert on financial planning matters for the *CPA Insider, Daily Oklahoman*, *The Planner Newsletter, OSCPA Focus Magazine, U.S. News & World Report, N Common Magazine for Women* and the *McAlester News Capital*. He serves as an editorial adviser to *The Tax Adviser, The Planner Newsletter* and previously served as editorial adviser to *The Journal of Financial Planning*. Most recently he authored and published articles for *CPA Insider titled "Are Ticking Time Bombs on your Client List?"* and The *Tax Adviser* titled "Key Planning Considerations for Cash Flow in Retirement". Jimmy was recognized by CPA Magazine as one of the "*Top 40 CPAs to Know in a Recession"*. He was recently appointed by Governor Mary Fallin to serve as a founding board member of the Oklahoma Employee Insurance and Benefits Board and served as its chairman.

Williams has been honored and awarded the *Outstanding Financial Planning Professional, Public Service Award and Accounting Hall of Fame Inductee* by the Oklahoma Society of CPAs.

Alan Moore

Alan Moore, MS, CFP® is the co-founder of the XY Planning Network, a support network for advisors looking to serve next generation clients. He is also the CEO of AdvicePay, the first and only compliant payment processor for financial advisors. He is passionate about helping financial planners start and grow their own fee-only firms to serve Gen X & Gen Y clients largely ignored by traditional firms. Alan has been recognized by Investment News as a top "40 Under 40″ in financial planning, by Wealth Management as one of a "The 10 to Watch in 2015″, and was the first recipient of the NAPFA Young Professional award in 2015. Alan frequently speaks on topics related to technology, marketing, and business coaching, and has been quoted in publications including The Wall Street Journal, Forbes and The New York Times. He is also the host of XYPN Radio, one of the largest podcasts for independent financial advisors. He currently lives in Bozeman, MT so that he can hit the slopes on powder days.