

ROBERT ALLEN, CFA, ABV, CEIV™

EDUCATION	<ul style="list-style-type: none"> ▪ Bachelor of Business Administration in Finance, Texas A&M University ▪ Master of Business Administration in Finance, Texas Christian University
PROFESSIONAL CERTIFICATIONS	<ul style="list-style-type: none"> ▪ Chartered Financial Analyst (CFA) - CFA Institute ▪ Certified in Entity and Intangible Valuations (CEIV) – American Institute of Certified Public Accountants ▪ Accredited in Business Valuations (ABV) - American Institute of Certified Public Accountants
PROFESSIONAL INVOLVEMENT	<ul style="list-style-type: none"> ▪ AICPA Business Valuation Committee <ul style="list-style-type: none"> - Appointed Member (2020 – 2023) ▪ CFA Institute ▪ Dallas/Fort Worth CFA Society ▪ Graduate, Leadership Fort Worth (2006) and Leadership Tyler (2009) ▪ Board of Directors, Leadership Fort Worth <ul style="list-style-type: none"> - Treasurer (2010 – 2014) - President-Elect (2014 - 2016) - President (2016 – 2018) - Past President (2018 – 2020)
BUSINESS EXPERIENCE	<ul style="list-style-type: none"> ▪ Whitley Penn (2002 – 2008; 2018 - Present) <ul style="list-style-type: none"> ▪ Partner - Forensic, Litigation & Valuation Services ▪ CBIZ Valuation Group, LLC, Dallas, Texas (2010 – 2012; 2014 – 2018) <ul style="list-style-type: none"> ▪ Senior Manager-Business Valuation ▪ J Taylor & Associates, LLC, Fort Worth, Texas (2012 – 2014) <ul style="list-style-type: none"> ▪ Senior Associate-Valuation Services ▪ Bailes & Co., P.C., Tyler, Texas (2008 – 2010) <ul style="list-style-type: none"> ▪ Manager– Business Valuation/Value Enhancement Services & Litigation Support
PROFESSIONAL ACTIVITY/PUBLICATIONS	<ul style="list-style-type: none"> ▪ Adjunct Professor of Valuation, Texas Christian University – Neeley School of Business (2013 – 2016) ▪ Special Topics in Accounting Graduate Class, University of Texas at Tyler- “Fair Value Accounting” ▪ Training Instructor, Bailes & Co., P.C. and Whitley Penn, LLP- “Business Valuation” ▪ Texas Society of CPAs-Fort Worth Chapter – “SFAS No. 141 & 142 – Business Combinations and Intangible Assets” ▪ Medical Management & Optometric Practice Seminar- “What’s Your Practice Worth?” ▪ Fort Worth Chamber of Commerce- “The Business Lifecycle- How to Grow and Value Your Business”
REPRESENTATIVE INDUSTRY EXPERIENCE	<ul style="list-style-type: none"> ▪ Transportation & Logistics ▪ Manufacturing & Distribution ▪ Restaurant & Hospitality ▪ Professional Services ▪ Healthcare ▪ Technology