



ROBERT J. ALLEN, CFA, ABV

- EDUCATION**
- Bachelor of Business Administration in Finance, Texas A&M University
 - Master of Business Administration in Finance, Texas Christian University
- PROFESSIONAL CERTIFICATIONS**
- Chartered Financial Analyst (CFA) - CFA Institute
 - Accredited in Business Valuations (ABV) - American Institute of Certified Public Accountants
- PROFESSIONAL INVOLVEMENT**
- AICPA Business Valuation Committee
 - 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
 - Treasurer (2010 – 2014)
 - President-Elect (2014 - 2016)
 - President (2016 – 2018)
 - Past President (2018 – 2020)
- BUSINESS EXPERIENCE**
- Whitley Penn (2002 – 2008; 2018 - Present)
 - Partner - Forensic, Litigation & Valuation Services
 - CBIZ Valuation Group, LLC, Dallas, Texas (2010 – 2012; 2014 – 2018)
 - Senior Manager-Business Valuation
 - J Taylor & Associates, LLC, Fort Worth, Texas (2012 – 2014)
 - Senior Associate-Valuation Services
 - Bailes & Co., P.C., Tyler, Texas (2008 – 2010)
 - Manager– Business Valuation/Value Enhancement Services & Litigation Support
- PROFESSIONAL ACTIVITY/PUBLICATIONS**
- 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**
- Transportation & Logistics
 - Manufacturing & Distribution
 - Restaurant & Hospitality
 - Professional Services
 - Healthcare
 - Technology