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**THOMAS**

Dec. 24, 2020



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multi-generational tax planning impacting ultra-high net worth families, closely held businesses and executives. He works from a net worth, cash flow and debt planning perspective, as it interplays with clients' compensation, single/restricted stock position, retirement and estate planning goals.

**What are you doing to make a difference in the profession, your community, the world?**

Found a non-profit: building on founders' purpose, incubating their passion from start-up through qualified 501(c)3 non-profit organization allowing for additional community resources to provide meals and personal needs to a targeted area of homelessness in Phoenix, AZ.

- I regularly speak or write, a few recent ones include:
- Trust Overview & State Taxation of Trusts – 2019 Presentation
- The Agile Career: The Intentional Pivot, The Power to Level Up and Live Well – 2019 Facilitation
- Introduction to Estate Planning – 2019 Presentation
- Retirement Asset & Investment Planning, Income and, Estate, Tax Considerations – 2019 Presentation
- Collectively Serving our Country – IRS Commissioner Rettig's Priorities – 2019 Publication
- In Pursuit of Purpose, Saying Yes with Intention, Keeping FOMO In Check – 2018 Presentation

**Favorite books/websites/podcasts/speakers:**

- Pivot (Book) and Jenny Blake, Google Talk
- Think Like a Monk, Jay Shetty
- Leaders Eat Last, Simon Sinek

- Brené Brown: The Call to Courage, Netflix Documentary

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