

2019 Estate Planning Hall of Fame



Dirk L. Edwards, CPA/PFS, JD, MBA, practices as the firm Edwards Consulting, LLC. His practice is devoted to the field of personal planning, serving high net worth clients throughout the United States and Western Europe. Mr. Edwards is a past chairman of the American Institute of Certified Public Accountants Personal Financial Planning Executive Committee and is the current chair of the AICPA PFP Services Standards Advisory Task Force and a past commissioner, AICPA National Accreditation Commission. He is a past State Chairman of the Oregon Society of CPAs PFP Committee, and is a member of the Oregon State Bar and American Bar Association.

Mr. Edwards lectures and writes extensively in the area of personal planning. He has instructed numerous AICPA courses in Financial and Tax Planning and has served as an Editorial Adviser to the Journal of Accountancy. Harcourt Brace published his book "Financial Planning for New Wealth". He has been named numerous times by Worth Magazine as one of the top financial advisors in the nation and in 2002 was named as one of the Top 100 Financial Planners by Mutual Funds magazine. He was named by Worth Magazine for three consecutive years as one of the top 100 attorneys in the country in the family wealth area. In addition, he has been often asked to contribute planning advice for articles in the *Practical Accountant*, *Investment Advisor*, *Worth*, *Mutual Funds* magazines and the *Wall Street Journal* and *New York Times*.

Dirk Edwards has been featured in the following articles, among others, during his professional career:

- *Practical Accountant* - "15 Best Practices for Financial Planners" by Howard W. Wolosky
- *Mutual Funds* - "100 Top Advisors Coast-To-Coast"
- *Investment Advisor* - "Windfall Wizard" by Karen Hansen Weese
- *The New York Times* - "Receiving a Lump Sum Without Taking Any Lumps" by Sharon R. King
- *The Wall Street Journal* - "CPA's Value Can Go Well Beyond Taxes" by Earl C. Gottschalk Jr.

Mr. Edwards received his JD and Masters of Business Administration from Willamette University in Oregon. He is accredited as a Personal Financial Specialist. Mr. Edwards maintains and works out of his west coast (Oregon) office.

Active in his local community, he has been President of the Congregation and Chairman of the Trustees of First Christian Church (Disciples of Christ), Portland, Oregon.