

Susan M. Tillery

Susan M. Tillery, CPA/PFS, AEP® (Distinguished) Nominee, is President & CEO of Paraklete® Financial, Inc. Paraklete® provides integrated fee-for-service personal financial planning and virtual family office services, without asset management or product sales. The firm acts as *An Advocate in Financial Services®* for its clients with a disciplined focus on independence and objectivity. Susan is also co-founder and President of Financial Planning Advocate, LLC, a provider of continuing education for CPA's, financial advisers, universities, and colleges.

Ms. Tillery's experience at Harris myCFO, a multi-family office where she was responsible for the development and delivery of comprehensive family office solutions to affluent families, together with her work at Arthur Andersen and Ronald Blue & Co provides the framework for Paraklete.

Susan earned both her bachelor's and master's degrees in Accounting from the University of Georgia. Susan is a member of the American Institute of CPAs (AICPA), the Georgia Society of CPAs (GSCPA) and the Atlanta Estate Planning Council. In addition, she is Chair of the AICPA Personal Financial Planning Executive Committee and past Chair of the AICPA Personal Financial Planning Credential Committee. Susan is a recipient of the AICPA 2019 Personal Financial Planning (PFP) Distinguished Service Award.

Ms. Tillery is the co-author of *Essentials of Personal Financial Planning*, a textbook used by colleges and universities in graduate programs in accounting, business, and law. Additionally, Susan has co-authored The AICPA Personal Financial Planning Certificate Program. The program addresses all areas of the Personal Financial Specialist (PFS) Body of Knowledge and successful completion, with related experience, permits participants to obtain the PFS Credential. She is a frequent speaker and author on topics relating to personal financial planning including, CPA's and Financial Planning, Virtual Family Offices, Collaboration, Planning and Tax Advisory Services, Financial Issues Facing Women, Responsibilities of Wealth, Charitable Giving, and Stewardship. Susan and her family reside in Kennesaw, Georgia.