



Clark M. Blackman II is founder and CEO of Alpha Wealth Strategies LLC, an SEC registered investment adviser with offices in Cypress and Houston, Texas providing personal investment, estate, tax and retirement counseling. He has been an advisor to high net worth individuals for over 40 years, 17 years with public accounting firms Arthur Andersen, F.E.R.&S. (Chicago), PWC and Deloitte (where he was National Director of I.A. Development and Midwest Regional Director of Investment Advisory Services). He is a past member of the Investments Committee of the AICPA and served nine years on the Executive Committee of the AICPA Personal Financial Planning Division; Vice Chairman and Chairman from 2009 - 2012.

He served on the AICPA's PFP Conference Committee for eight years until 2018, and until 2016 served five years on the AICPA's Advanced Estate Planning Conference Committee. He is a long time technical editor for the Journal of Accountancy (JofA) and serves on the JofA "Subject Matter Panel of Experts." He led the AICPA task force providing technical editing of the "*Prudent Practices for Investment Advisors*" and "*Prudent Practices for Investment Stewards*" handbooks published by Fi360. In 2012 he became the AICPA member representative of the International Standards Organization's U.S. Technical Advisory Group ISO TC/222 responsible for the Personal Financial Planning international standards initiative [ISO 22222]. He was an inaugural member of the Institute for the Fiduciary Standard "*Best Practices Board*" [2014 - 2018] and is a current *Member – Emeritus*.

Clark served 22 years as a member of the Greater Houston Community Foundation's Investment Committee until 2021. A founding member of The Committee for the Fiduciary Standard, he is a past officer and currently serves on the Steering Group. A long-time volunteer and consultant on private wealth matters, he is currently serving the CFA Institute as an active member of the Private Wealth Practice Analysis Panel of the Americas Practice Analysis & Curriculum Development Team for the CFA Level III Exam. A past officer of the CFA Society Houston Board of Directors, he has served on conference committees for the Society, including the CFA Society Houston/Rice University Wealth Management Symposium "Putting Investors First" conference committee. He helped create, and was inaugural chairman of, the Investor Advocacy Committee for the CFA Societies of Texas in 2015 and remains active as a member of that committee. Clark was very active with the Houston CPA Society Personal Financial Planning Committee, where he served for 16 years until 2015. Clark has received such recognitions as: AICPA's "*Distinguished Service to the Profession*" award [2012]; Accounting Today's "*Top 100 Most Influential People*" [2011]; AICPA's Business & Industry "*Hall of Fame Award*" [2005]; Houston CPA Society's "*Distinguished Service Award*" [2004]; RobbReport/Worth magazine's "*The Nation's 100 Most Exclusive Wealth Advisors*" [2004]; and Worth magazine's bi-annual list of "*Best Financial Advisors in America*" [1996 - 2004]. He is an eleven consecutive year winner of the "*Wealth Managers of Texas Five Star Award*" in Houston [2013 - 2023]. He is a past member of the Houston Estate and Financial Forum and a past member of the Houston Business & Estate Planning Council. Clark has written numerous articles on tax, financial and estate planning topics, as well as on fiduciary responsibility, for national publications; and has spoken at numerous national conferences over four decades on financial planning topics.

Clark has a master's degree in accounting and a BBA (distinguished) in accounting & finance from the University of Iowa, and is a CFA, CFP®, CPA/PFS, CGMA, AAMS and Accredited Investment Fiduciary.