



Bill Walsh, CPA, PFS

Consulting Partner

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ABOUT BILL

Leading our financial advisory services, Bill has established himself as a trusted advisor, consultant, and financial planner for our clients and business owners. Bill's responsibilities include financial advisory services, general business consulting, strategic planning, succession planning, and assurance services. Mr. Walsh advises business owners and high net-worth individuals regarding wealth building and protection strategies. Mr. Walsh is a registered financial advisor and licensed in NASD/FINRA Series 7 and NASD/FINRA Series 66.

PROFESSIONAL ASSOCIATIONS

- American Institute of CPAs (AICPA)—Member
- Texas Society of CPAs (TSCPA)—Member
- Dallas Chapter of TSCPA—Member
- Financial Planning Association—Member

COMMUNITY INVOLVEMENT

- Baylor University Accounting & Law Advisory Council—Board Member
- Heartlight Ministries Foundation, supports a nonprofit residential counseling facility for teenagers—Board Chairman

LICENSED IN

- Texas
- NASD/FINRA Series 7
- NASD/FINRA Series 66

AREAS OF FOCUS

- Wealth Management
- Family Owned Businesses
- Entrepreneurial Businesses

ACADEMIC BACKGROUND

- Texas Tech University
*Bachelors of Business Administration,
Accounting*