

# Terri L. Holbrook, CPA, MT

## Summary of Professional Background

**2009-Current:** Professor of financial accounting and federal taxation courses in the graduate and undergraduate programs of Lerner College of Business and Economics, University of Delaware, Newark, DE

In addition to teaching, Ms. Holbrook provides consulting services to CPA's engaged in tax practice, and also to her prior employer, Thomas Weisel Partners.

**2000-2009:** Director, Thomas Weisel Partners, Investment Bank, San Francisco, CA and New York, NY.

- 2004-2009 Ms. Holbrook was a director in the Private Client Department specializing in equity trading/investment strategies and asset management. She developed a business of institutions and high-net-worth individual clients.
- 2000-2004 Ms. Holbrook joined Thomas Weisel in February 2000 as the firm's senior tax expert to consult with corporate and individual clients on income and estate tax matters. She was responsible for strategies and programs including financial planning, derivative and hedging strategies, tax-efficient portfolio diversification, life insurance wrapper programs and all other tax-related issues.

**1991-2000:** Partner, BDO Seidman, LLP, Denver, CO

- 1994-2000 As a partner of BDO, she served her client base of corporations and closely-held businesses in the real estate, consumer, industrial, and manufacturing industries. Ms. Holbrook represented clients before the IRS and various state tax departments. She chaired the firm's national pass-through entity tax practice, taught national CPE courses for the firm's professionals and served as an expert witness and consultant in the technical areas of partnerships, LLCs, and joint ventures.
- During her tenure with BDO Seidman Ms. Holbrook authored "Partnership Taxation-Intermediate" and "Partnership Taxation-Advanced", two course manuals that she used to teach national education courses for the Colorado Society of CPAs, and the AICPA. She spoke at numerous conferences for the AICPA and various state societies of public accountants. She has published technical articles in various publications, including The Tax Advisor, The Journal of Real Estate Taxation and The Journal of Partnership Taxation.
- Ms. Holbrook had P&L responsibility for her tax practice, served as business development and marketing director for the Denver office of BDO and managed a staff of 25 other professionals.
- 1991-1994 Served as Tax Manager of Mitchell, Finley and Associates which was acquired by BDO Seidman in 1995. She was responsible for tax research and compliance for corporate and closely-held businesses, managing five staff persons, and developing new business.

**1988-1991** Financial Director, Leonard/Hodges family office, Fort Worth, TX

- Ms. Holbrook served as the Tax and financial director for this wealthy family office, with operations in real estate, agriculture, manufacturing, oil and gas development and specialty retail. During her tenure with this four-generation family, with operations in over 250 legal entities, Ms. Holbrook developed plans of business succession, estate planning, asset spin-offs and divisive reorganizations.

**1984-1987** Ernst & Young, Dallas-Fort Worth, TX

- As a CPA and associate, Ms. Holbrook served national corporate and high-net-worth individual clients in audit, tax research, tax controversy and compliance matters.

### **Education and Professional Certifications**

Masters of Science in Taxation, University of Texas, Arlington, 1991

Bachelor of Business Administration, major in Accounting, Baylor University, 1983

Certified Public Accountant since 1985

AACSB Bridge Program, June 2009 (certified PQ status for AACSB accreditation)

**References, teaching evaluations and syllabi provided upon request**

**Contact:** [terri.holbrook@comcast.net](mailto:terri.holbrook@comcast.net)