

Resume — Kevin F. Roach

Education

May, 1973 - B.S. in Accounting, University at Albany, Albany, NY
Summer 1986, completed an intensive month long Executive MBA course at
Columbia University

Professional Designations

Certified Public Accountant licensed in Texas
Specialist Designation in Personal Financial Planning granted by the American
Institute of Certified Public Accountants

Experience

Kevin spent his entire 35 year professional career at PricewaterhouseCoopers LLP (PwC) before retiring in June, 2008. He had been a partner for 24 years and had extensive experience in providing personal financial services to corporate executives, closely held business owners, and other high net worth individuals, specializing in income and estate tax, executive compensation, and philanthropic planning issues. Kevin held senior practice management positions at PwC including national managing partner of their High Net Worth Individual Planning practice as well as regional management roles for this practice in the Central and Western regions.

Kevin has been often quoted as a thought leader in both print and electronic media. He had been a frequent guest on CNN and served as a source of information for writers at *The New York Times*, *Wall Street Journal*, *Los Angeles Times*, and other trade and professional media. He has recently been appointed to the Editorial Board of the *Tax Adviser*, a leading journal for tax professionals.

Kevin had also been a leader in college campus recruiting for PwC, having served as the primary relationship partner for the firm's recruiting activities at Texas A&M University and at the University of Southern California (USC). In conjunction with this role, Kevin had been a frequent guest lecturer. He also taught a course in the Masters of Tax program at the USC Marshall School of Business during 2008 where he received outstanding student evaluations.

Kevin began his career with PwC in their Buffalo office, transferred to New York City where he was admitted as a partner in 1984, transferred to Dallas where he spent seven years, and had been a member of the firm's Los Angeles office since 2004 until his retirement

Kevin joined the faculty at Texas A&M as an Executive Professor in the Mays Business School in August 2008.

Kevin also is on the Editorial Board of The Tax Adviser, a leading periodical for professional tax practitioners.

Affiliations

American Institute of Certified Public Accountants (AICPA)

Former member, AICPA Personal Financial Planning Division — Executive Committee. Recently re-appointed by the AICPA to this Executive Committee for a three year term commencing October,2009.

Awards

Recipient of the Mays Business School 2010 Lockheed Martin Teaching Excellence Award