



Jimmy J Williams, CPA/PFS, CFP®

Jimmy is the CEO/President of Compass Capital Management, LLC, a wealth management firm. He specializes in creating plans for retirees and near-retirees utilizing tax-efficient strategies.

Throughout his career, he has served the AICPA as a Commission on the National Accreditation Commission, the board of directors and treasurer of the AICPA Foundation. He has served the OSCP as President and chaired many of its committees.

He has written technical articles for U.S. News & World Report, The Planner Newsletter, Tax Adviser Magazine, The CPA Insider and the Journal of Financial Planning. Jimmy has authored and presented courses in professional ethics, tax planning, leadership, motivation and financial planning techniques.

Jimmy has been recognized as one of the “Top 40 CPAs to Know in a Recession”. Recently, he was appointed by Oklahoma Governor Mary Fallin to Chair the Oklahoma Employees Insurance Benefits Board.

Session Topic: Ethics: Its History and Application in Today’s Business World