

William E Summers, CPA, CFP®, MST

M.S. degree in Accounting/Taxation

B.A. degree in Finance

University of Washington

William Summers is a Certified Public Accountant and Certified Financial Planner® with an extensive public accounting background with Ernst & Young, LLP and two independent accounting firms. He has a combined experience of more than 16 years in tax law and financial planning. He has taught over 50 stock option planning training seminars nationwide for nearly 400 financial advisors. As a specialist in stock option planning and tax efficiency strategies that maximize net worth, he is requested as a speaker, contributing author, media source, and consultant. For nearly four years Mr. Summers worked as a consultant of planning and taxation with Net Worth Strategies, Inc., the leading provider of stock option planning software. During this time, he helped many advisors and executive clients to understand the tax and cash flow implications of various exercise and sale strategies using technology he helped develop.

In addition, Mr. Summers has held Series 7, Series 63, and Series 65 securities licenses and served as a stockbroker with PaineWebber prior to joining Net Worth Strategies. He has spoken at several conferences, including those for the Financial Planning Association, the American Institute of CPAs, and the Investment Management Consultants of America. Mr. Summers is also a member of the review board for the National Board of Certified Option Advisors, which manages and administers the new Certified Option Advisor designation.

Integrated Capital Planning

541-419-9965 / bsummers@icapplan.com

19469 West Campbell Road

City, State, ZIP: Bend, OR 97702