

Tom Robinson

Thomas R. ("Tom") Robinson joined CFA Institute as Head, Educational Content in the Education Division of the CFA Institute in January 2007. Effective September 1, 2008 he takes on the role of Managing Director, Education. He leads and develops the teams responsible for producing and delivering educational content and examinations to candidates, members and other investment professionals encompassing the CFA Program, CIPM Program, Lifelong Learning, Private Wealth, Publications, and Conferences.

Previously Tom was an Associate Professor of Accounting and Director of the Master of Professional Accounting program at the University of Miami. He also was also Managing Director of TR Robinson & Associates, LLC a state registered Investment Advisory firm. Tom primarily taught Financial Statement Analysis, Personal Financial Planning and Valuation. He has a B.A. in Economics from the University of Pennsylvania and a Masters and PhD from Case Western Reserve University. Tom is a Certified Public Accountant (Ohio), Certified Financial Planner® (CFP®) certificant and Chartered Financial Analyst® (CFA®) charterholder. Prior to joining the University of Miami Tom practiced public accounting and financial planning for ten years, primarily with Deloitte & Touche and Pritchett Dlusky & Saxe in Columbus, Ohio. He has also served as a consultant to law firms, accounting firms, professional associations and governmental agencies in the areas of financial statement analysis and valuation.

In his academic career Tom has won several teaching awards and has published regularly in academic and professional journals such as the Journal of Accounting, Auditing and Finance and the Journal of Financial Planning. Research included extensive study of analyst reports for the AICPA Special Committee on Financial Reporting (the "Jenkins" Committee). He is Associate Editor of Research in Accounting Regulation and has served on the editorial review board of several professional journals. He has authored or co-authored five books including:

- Tools and Techniques of Investment Planning published by National Underwriter.
- Analysis of Equity Investments: Valuation published by the CFA Institute which is required reading in the CFA program.
- Financial Statement Analysis: A Global Perspective published by Prentice Hall
- International Financial Statement Analysis, forthcoming from CFA Institute and required reading in the CFA program.

Tom was active locally and nationally with the CFA Institute prior to joining the staff. Tom has served CFA Institute as a grader, as a member of the Council of Examiners, and was involved in advocacy work as a member of the Financial Accounting Policy Committee and the Financial Instruments Task Force. He was an invited speaker and moderator on numerous occasions through the Speaker Retainer Program and for other CFA Institute conferences. Additionally, Tom was involved in the Global Body of Investment Knowledge/Practice Analysis task force. He served in various capacities including president and board member of CFA Miami (formerly The Miami Society of Financial Analysts). He has been co-author, lead author, and consultant for curriculum readings for the CFA Program examinations.