



Thomas Jay Barrett, Jr.
Personal Financial Planning Specialist

Tom also serves as a private trustee for clients, and is a current or prior member of the boards of numerous non-profit organizations. He has served in various roles with his present and prior professional associations, which include the Colorado Society of CPAs, the AICPA, the Colorado Bar Association, the American Bar Association, and the American Association of CPA/Attorneys. He is also an active member of the Colorado Mountain Club and the Marine Corps Association.

Thomas Jay Barrett Jr. has been practicing in the area of financial planning and investment asset management for more than thirty years. He was among the first of the group of CPAs in Colorado to qualify for the designation of *Personal Financial Planning Specialist* granted by the American Institute of Certified Public Accountants. In his practice as both a CPA and an Attorney he has focused on coordinated tax and financial planning for wealthy individuals, families and closely held corporations. In addition to asset management, his practice has included tax, estate, trust and probate matters. He has served as an attorney, arbitrator or expert witness in more than 200 cases involving financial matters. Tom continues a limited legal practice in the estate and trust area through Thomas Barrett & Assoc. P.C as well as being a member of Helm Investment Management, LLC.

Tom graduated from the University of Michigan in 1968 with a major in English and minors in psychology and economics. He became a Marine Corps officer and served in Vietnam primarily with the 3rd Battalion, Fifth Marines. He continued in the USMC active reserves until 1976. Tom received both a Masters Degree in Accounting and a Law Degree from the University of Denver. He began his practice in Denver as a member of the audit staff at Ernst and Ernst. He later joined the tax department of Price Waterhouse which he eventually left to begin private practice.

Tom is an avid skier, hiker, white water canoeist and yoga aficionado. He is a long time and continuing volunteer with the Episcopal Diocese of Colorado, The Colorado Episcopal Foundation and St John's Cathedral. Tom and his wife's avocations are literature, theater, opera and travel.



THOMAS JAY BARRETT, JR. J.D, CPA/PFS

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<u>EDUCATION:</u>	University of Michigan - 1968 University of Denver - 1974 University of Denver - 1976	AB (English/Economics) MSBA (Accounting) J.D. (Law)
<u>PROFESSION:</u>	Attorney-at-Law Personal Financial Specialist (PFS) Certified Public Accountant (CPA)	1976 1986 1975
<u>EXPERIENCE:</u>	Thomas Barrett & Assoc., P.C. Barrett/Pontiff & Fairweather, P.C. Price Waterhouse & Co. Ernst & Ernst U. S. Marine Corps	Since 1976 1987 - 2006 1974 - 1976 1973 - 1974 1968 - 1971
<u>LECTURER:</u>	University of Denver Law School Continuing Legal Education Colorado Society of CPA's	Various Various Various
<u>ARTICLES:</u>	Multistate Sales & Use Taxation Tax Considerations of Divorce Colorado Property Settlements - Are They Really Tax Free? How Would Your Family Fare if You Died Today?	Journal of Corp. Tax. The Colorado Lawyer The Colorado Lawyer Physician's Management
<u>PROFESSIONAL SOCIETIES:</u>	Colorado Society of Certified Public Accountants American Institute of Certified Public Accountants American Bar Association Colorado Bar Association Denver Bar Association	
<u>OTHER:</u>	Accredited Personal Financial Specialist (Cert. #37)	