Terri L. Holbrook,CPA,MST

Current Position

2011 - Current: Full-time Senior Lecturer, Accounting Department, McCombs School of Business, University of Texas, Austin, TX.

- Teaches graduate and undergraduate courses in Federal income tax and taxation of flow-through entities, including partnerships and S-corporations.
- Developed, designed and teaches the initial capstone course in Financial Planning and Wealth Management.
- In addition to teaching, Ms. Holbrook provides consulting services to CPA's engaged in tax practice and expert witness services in her field of expertise.

Professional Background

2009-2011: Adjunct faculty, University of Delaware, Newark, DE.

- Professor of financial accounting and federal taxation courses in the graduate and undergraduate programs of Lerner College of Business and Economics.

2000-2009: Director, Stifel Nicolaus (formerly Thomas Weisel Partners), Investment Bank, San Francisco, CA and New York, NY.

- 2004-2009 Ms. Holbrook was a director in the Private Client Department specializing in equity trading/investment strategies and asset management. She developed a business of institutions and high-net-worth individual clients.
- 2000-2004 Ms. Holbrook joined Thomas Weisel in February 2000 as the firm's senior tax expert to consult with corporate and individual clients on income and estate tax matters. She was responsible for strategies and programs including financial planning, derivative and hedging strategies, tax-efficient portfolio diversification, life insurance wrapper programs and all other tax-related issues.

1991-2000: Partner, BDO, LLP, Denver, CO office

- 1994-2000 As a partner of BDO, she served her client base of corporations and closely-held businesses in the real estate, consumer, industrial, and manufacturing industries. Ms. Holbrook represented clients before the IRS and various state tax departments. She chaired the firm's national pass-through entity tax practice, taught national CPE courses for the firm's professionals and served as an expert witness and consultant in the technical areas of partnerships, LLCs, and joint ventures.
- During her tenure with BDO Ms. Holbrook authored "Partnership Taxation-Intermediate" and "Partnership Taxation-Advanced", two course manuals that she used to teach national education courses for the Colorado Society of CPAs, and the AICPA. She spoke at numerous conferences for the AICPA and various state societies of public accountants. She has published technical articles in various publications, including The Tax Advisor, The Journal of Real Estate Taxation and The Journal of Partnership Taxation.
- Ms. Holbrook had P&L responsibility for her tax practice, served as business development and marketing director for the Denver office of BDO and managed a staff of 25 other professionals.
- 1991-1994 Served as Tax Manager of Mitchell, Finley and Associates which was acquired by BDO in 1995. She was responsible for tax research and compliance for corporate and closely-held businesses, managing five staff persons, and developing new business.

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1988-1991 Financial Director, Leonard/Hodges family office, Fort Worth, TX

- Ms. Holbrook served as the Tax and financial director for this wealthy family office, with operations in real estate, agriculture, manufacturing, oil and gas development and specialty retail. During her tenure with this four-generation family, with operations in over 250 legal entities, Ms.Holbrook developed plans of business succession, estate planning, asset spin-offs and divisive reorganizations.

1984-1987 Ernst & Young, Dallas-Fort Worth, TX

- As a CPA and associate, Ms. Holbrook served national corporate and high-net-worth individual clients in audit, tax research, tax controversy and compliance matters.

Education and Professional Certifications

Masters of Science in Taxation, University of Texas-Arlington, 1991
Bachelor of Business Administration, major in Accounting, Baylor University, 1983

Certified Public Accountant since 1985. Currently licensed in Colorado.
Member of AICPA, and AICPA Tax Section and AICPA Personal Financial Planner Section

Graduate of AACSB Bridge Program, June 2009 (certified PQ status for AACSB accreditation)

Honors and Awards

Recipient of the 2016-17 Hank & Mary Harkins Foundation Award for Effective Teaching in Undergraduate Classes.

Recipient of the McCombs 2015 Faculty Honor Roll award, presented by the Undergraduate Business Council, for excellence in teaching.

Recipient of the James W. Deitrick Outstanding Accounting Faculty Award, presented by the MPA students, May 2020.

Service

Ms. Holbrook serves McCombs as a member of the Wealth Management Advisory Committee and by participating in teaching initiatives and program committees. She also commits much time to student mentoring and advisory meetings.

Ms. Holbrook and her husband fund a scholarship program entitled “The Holbrook Scholar Program” for MPA students at McCombs School of Business for Accounting. Students are awarded annual scholarships based upon academic excellence and financial need. The program began in 2014 and currently supports 15 students.

Ms. Holbrook is the Treasurer of the Four Seasons Austin Residential Tower HOA, supports various Austin charities and is involved in the downtown Austin community.