

BIOGRAPHY



Mark W. Kelley, CFP®
Plano, TX

7200 Bishop Road
Suite 240
Plano, TX 75024

1.469.252.1041 direct
1.972.335.9545 fax

mark.kelley
@clark-consulting.com

Mark W. Kelley joined Clark Consulting in 1998. Mr. Kelley is a strong advocate for community banking with specific expertise in benefit planning for bank officers, directors and owners. He has worked with clients nationwide, serving as a focused resource for their ongoing benefit plan needs. In addition, Mr. Kelley has been instrumental in the development of educational seminars on the topics of compensation, benefits and bank-owned life insurance (BOLI).

Mr. Kelley specializes in the design and implementation of compensation and nonqualified benefit plans for officers and directors of financial institutions. He works with banks to develop an understanding of current and long-term needs; provides an analysis of existing compensation and benefit practices; and then prepares recommendations that address impact on cash flows, earnings, shareholder value and other bank objectives to facilitate board approval. Mr. Kelley also works with bank accountants, attorneys and consultants to provide a coordinated financial strategy utilizing bank-owned life insurance (BOLI) to minimize the impact of plan costs on earnings.

Mr. Kelley earned a Bachelor of Science degree in finance at Oklahoma State University. He is a CERTIFIED FINANCIAL PLANNER™, has passed the Series 6 and 63 qualifying exams with the National Association of Securities Dealers (NASD) and is a licensed insurance representative.