

# David A. Schlein

## CPA

Partner

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Dave is a tax partner with over 30 years' experience in service to closely held family run businesses, high net worth individuals and for-profit flow through entities. Dave's expertise lies in the areas of real estate investments, the oil and gas industry, partnerships, S corporations, and closely held C corporations. His day-to-day activities include investment advisory services, the coordination and delivery of tax planning and compliance services for individuals and businesses. Dave is a Registered Representative holding his FINRA Series 7 and 66 licenses; he also holds Life, Accident, and Health Insurance licenses.

Joining the Firm in 1980, Dave became partner in 1996; he frequently lectures on various wealth management, retirement planning, and on new tax laws and their implications.

### EDUCATION

State University of New York at Buffalo, Bachelor of Science, Accounting

### PROFESSIONAL

American Institute of Certified Public Accountants

New York State Society of Certified Public Accountants

- Management Advisory Service Committee, Former Chairman

Financial Planning Counselors of WNY

Passed Series 7 and 66 securities exams - Financial Advisor\*

New York State Department of Insurance, Life, Accident and Health Insurance Licenses

BDO Alliance USA, National Tax Core Leaders Group

### COMMUNITY

Jewish Family Services, Treasurer of the Board of Directors

Kalos Health, Board Member

Gilda's Club of WNY, past Board Member

Lodge of the Ancient Landmarks F & AM, past Master

Temple Beth Am, past Treasurer

Kadimah School of Buffalo, Certificate of Recognition-State of New York Executive Chamber

*\*Securities offered through Avantax Investment Services <sup>SM</sup>, Member FINRA, SIPC. Investment Advisory services offered through Avantax Advisory Services <sup>SM</sup>. Insurance services offered through an Avantax affiliated insurance agency.*