

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 holds 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

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