



David is an independent wealth strategist to individuals and families at LPL Financial LLC in Irvine, California, and Westport, Connecticut. David has spent his entire career in finance, both at investment firms and corporate settings. He began with Brown Brothers Harriman & Co. on Wall Street in investment banking; served as treasurer, then chief financial officer at Timex Corporation; and worked in private equity with Kohlberg Kravis Roberts & Co. David received a BA in economics and an MBA with High Distinction from Harvard University.