D A V I D S T . J O H N

PROFESSIONAL MISSION

My professional mission to be an trusted advisor to small business owners and families that aspire to a holistic, balanced, and financially secure lifestyle. I am dedicated to faithfully servicing my clients with integrity and excellence.

PROFESSIONAL BACKGROUND

- Investment Advisor Representative affiliated with Avantax Advisory Services℠ (IAR)
- Tax advisor enrolled to practice before the Internal Revenue Service (EA)
- Certified Financial Planner (CFP®)
- Chartered Financial Consultant (ChFC)
- Chartered Life Underwriter (CLU)
- Independent insurance agent and employee benefits broker
- QuickBooks ProAdvisor

EDUCATIONAL BACKGROUND

- Bachelor of Science: Excelsior College, Albany, NY
- Masters in Business Administration: National University, San Diego, CA
- Masters of Science (Accounting/Tax): Oklahoma State University, Stillwater, OK
- Bachelor of Arts (Spanish): University of Tulsa, Tulsa, OK

LICENSES HELD

- FINRA 6, 63, 7
- Insurance: property & liability, life & health

AREAS OF PRACTICE

- Data Management
- Cash Flow Management
- Risk Management
- Tax Management
- Wealth Management*
- Retirement Planning
- Estate Planning

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