



**David Holden, CPA**  
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David has nearly twenty years of experience in tax planning and compliance for corporations, partnerships and individuals. His tax and accounting clients include high-net-worth individuals and multi-generational family groups in various industries.

Clients value David's depth of expertise, and the solid tax guidance and planning advice he provides. He helps clients reach their objectives by aligning tax strategies to their business strategy.

**Specializations:**

Strategic Planning

Tax Planning and Compliance

Tax Minimization Strategies

**Industry Expertise:**

High Net Worth Individuals

Manufacturing

Distribution and Wholesale

Investment

David previously worked with the national companies Ernst and Young and KPMG as a tax manager.

David is a Certified Public Accountant and graduated from New York University with a Bachelor of Science in Accounting and Finance.

In his personal time, David enjoys spin class and reading fiction.

