

Bio:

David K. Walser, CPA/PFS

Location: Phoenix, Arizona

Direct Line: (602) 765.3089 ext. 18

E-mail: dwalser@frostpllc.com

Area of Specialty:

Private Wealth Services (wealth management, estate planning, fiduciary and individual income tax)

Education:

Master of Accountancy in acknowledgment of major achievements in Tax, Brigham Young University

B.S. in Accounting, Brigham Young University

Professional Experience:

Leader of Frost PLLC's Private Wealth Services practice, which meets the personal tax and financial needs of the firm's clients. David began his career in Phoenix, Arizona, working for a "Big 8" accounting firm. David's clients were mostly entrepreneurial businesses and the business owners and families. As a new manager, David founded the Phoenix office's family wealth planning practice. Another Big 8 firm recruited David to Dallas to start a similar practice. In working with these clients, David crafted unique solutions that saved the clients hundreds of millions of dollars in taxes. Many of David's ideas – unique at the time – have become widely accepted in the industry.

In addition to serving clients, David has served on the national technical committees for three international accounting firms. In these roles, he helped develop firm policies, approved tax positions, and trained firm professionals in the techniques he uses to serve clients. David is also a frequent public speaker, making presentations to attorneys, CPAs, trust officers, and other professionals serving closely held business owners and their families.

Professional Associations:

American Institute of Certified Public Accountants (including the tax section and the personal financial planning section)

Arizona Society of Certified Public Accountants (Past-chair of the tax section and former board member)

Central Arizona Estate Planning Council (Past-president and board member)