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Dave heads up the Tools business line. He is responsible for product development and management of the online tools and other tools-related products. Dave also is the core relationship manager for individual advisor subscriptions to the online tools.

Dave graduated Magna Cum Laude from the University of Pittsburgh in 2003 with a B.S.B.A in Finance. Dave holds the Accredited Investment Fiduciary designation, the NASD Series 65 license and is a Chartered Financial Analyst (CFA) Charterholder.