



David E. Bremer, CPA, CFP®, PFS  
Partner

*"My clients find great comfort in having both personal and business finances positioned for their benefit. Having their financial house in order lets them concentrate on what they do best and enjoy most."*

### **Professional Focus**

- Provides wealth management and tax services to individuals and businesses
- Assists clients in defining and achieving their financial goals and objectives
- Provides investment advice for clients as an Investment Advisor Representative of Boulay Financial Advisors, LLC and a Registered Representative of 1st Global Capital Corp.
- Consults with clients regarding qualified and non-qualified retirement plans, estate planning, education funding and investment management
- A Certified Financial Planner™ (CFP) as well as a Personal Financial Specialist (PFS)
- Responsible for administering Boulay Financial Advisors, LLC's compliance policies and procedures as Chief Compliance Officer

### **Professional Experience**

- Over 25 years of experience in wealth management, taxation and management consulting
- Joined Boulay, Heutmaker, Zibell & Co. P.L.L.P. in 1980
- Directs Boulay Financial Advisors, LLC., a registered investment advisory firm

### **Education**

- Mankato State University  
*B. S. Accounting and Business Finance*
- Financial Planning Association  
*Certified Financial Planner™*
- American Institute of Certified Public Accountants  
*Personal Financial Specialist*
- Series 7, 63 and 65 Licensed

### **Professional Activities**

- American Institute of Certified Public Accountants
- Personal Financial Planning Division of AICPA
- Minnesota Society of Certified Public Accountants  
*Personal Financial Planning Committee Past Chair*
- The Financial Planning Association

### **Community Involvement**

- Eden Prairie Assembly of God Church
- Minnesota State and United States Handball Associations

*Securities offered through 1st Global Capital Corp., Member FINRA, SIPC. Investment Advisory services offered through Investment Advisor representatives of Boulay Financial Advisors, LLC. Boulay Financial Advisors, LLC is not affiliated with 1st Global Capital Corp*