



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



952.893.3821
dbremer@bhz.com

"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."

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

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