



David R. Roberts, CFP[®]

FINANCIAL ADVISOR

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David brings his 25 years of industry experience to each client relationship. He strives to provide clients with clarity and confidence throughout each of their different stages of life, using a personalized financial plan, disciplined investment management, and outstanding client support.

David is a CFP[®] (CERTIFIED FINANCIAL PLANNER[™]), and he graduated from Connecticut College with a BA in Economics. He began his career in financial services with Legg Mason in Boston before moving to Florida and starting a 20 plus year career with TDAmeritrade. At TDAmeritrade, he was an Investment Consultant helping clients with retirement planning and investment management. David held branch leadership roles in Atlanta and Omaha before moving back to Sarasota, FL, where he resides with his family and three dogs.

David and his wife, Jennifer, have two children. In their free time, they are usually on a field watching lacrosse or walking around Walt Disney World. Outside of family fun, he enjoys competing in local area Crossfit[®] events.

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