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David K. Walser

CPA/PFS



Managing Director, Private Wealth Services National Technical Leader

David is a Managing Director and the Private Wealth Services National Technical Leader, working out of Phoenix. Mr. Walser provides technical guidance to Grant Thornton professionals on gift, estate, generation-skipping, and income tax matters affecting Grant Thornton's wealthiest clients. He also represents these clients before the IRS in obtaining private letter rulings and in defending their interests in tax audits. David is responsible for developing and presenting training for Grant Thornton's Private Wealth Services professionals.

Experience

David has over two decades of experience helping Ultra-High Net Worth individuals and families meet their financial objectives. Mr. Walser was the practice leader of the private wealth services practice for the Dallas and Phoenix offices of a major accounting firm. He also ran a similar regional practice for a major financial institution.

Professional qualifications and memberships

- Member, American Institute of CPAs
- Member, Arizona Society CPAs
- Board member and officer, Central Arizona Estate Planning Council

Community Involvement

- Board Member, Arizona State Board of Private Postsecondary Education
- Chair, Finance Committee - Arizona State Board of Private Postsecondary Education

Education

Mr. Walser has BS in accounting and Masters of Accountancy (in acknowledgement of major achievements in Tax) degrees, both awarded by Brigham Young University.

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