

DAVID EATON, ChFC®, CLU®

Vice President

David is a co-founder of the firm and has more than 30 years of experience in estate planning and wealth management for ultra-wealthy business owners and families.

He is responsible for individual client relations and the firm's marketing to those who are not yet clients.

Mr. Eaton received a Bachelor of Science (BS) degree in Business and Economics from Lehigh University and holds both the Chartered Financial Consultant (ChFC) and Chartered Life Underwriter (CLU) designations from the American College. In addition he is an active member of the Financial Planning Association (FPA), International Association for Financial Planning (IAFP), Philadelphia Estate Planning Council and the Society of Financial Service Professionals.

David is also a former Coach with both the Conestoga Generals Pop Warner football program and the Devon-Strafford Little League. He lives in suburban Philadelphia with his wife and four children.