



**David B. Mirsky**  
**CPA/PFS, CFP<sup>®</sup>, CMA**  
Account Executive

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*“Saving money is finding money,” says Dave, and it’s something he does for clients regularly. With his auditor’s eye for detail and his methodical, thorough approach to financial analysis, he is keenly attuned to identifying opportunities for his clients.*

## Credentials

- University of Rochester, Simon School, MBA, Finance & Entrepreneurship
- SUNY Albany, BS, Accounting/Economics
- Certified Public Accountant
  - Personal Financial Specialist
- Certified Management Accountant
- Certified Financial Planning<sup>®</sup> Certificiant

## Professional Associations

- American Institute of Certified Public Accountants
- New York State Society of Certified Public Accountants
- Institute of Management Accountants
- Estate Planning Council of Rochester

## Background

Working from an office in Rochester and the home office in Corning, Dave also provides special expertise to other Account Executives within the firm in tax efficient strategies for corporations, partnerships and sole proprietorships. Dave’s quiet manner reflects his highly focused thinking and keen interest in helping his clients make the best possible financial decisions.

## Areas of Expertise

- Retirement Planning
- Tax Planning and Preparation
- Investment Management
- Estate Planning
- Education Planning

