Dave Cook, CPA, CFP® | Rehmann

Dave develops creative strategies that help clients work toward meeting their financial goals, integrating asset management and retirement plan services with overall business and financial plans. He works with a cross-functional Rehmann team to proactively guide each client, considering tax law and efficiencies, estate planning, and other financial needs along the way.

Dave began his career in tax in 2015, later focusing on wealth management, supporting high-net worth individuals and business owners. He has extensive knowledge of financial planning, asset allocations, and estate planning.

Dave received the CFP® certification from the Certified Financial Planner™ Board of Standards. He holds the Series 7 and 66 securities registrations, and is also a Certified Public Accountant. Being a CPA brings a unique skillset to the financial planning process, enabling him to recommend different options for tax savings. He keeps current on industry standards by attending seminars and graduate-level courses offered through professional societies and associations.

Service areas in Dave’s expertise include comprehensive financial planning; investment analysis and portfolio design; retirement and estate planning; and qualified and non-qualified retirement plans.