



Goldstein Advisors

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Dave Sharpe

Financial Planner

CRPC®, APMA®, C(k)P®, CRPS®, AAMS®, CLTC®, CPFA®

Dave has worked in the financial services industry since 2006 and strives to impact the lives of his clients in positive, meaningful ways. Using his mathematical mind, he employs his problem-solving abilities and knowledge of the financial markets to help clients find a balance of appropriate risk and growth components.

He particularly enjoys evaluating clients' needs and developing strategies designed to help them achieve their goals in the areas of business retirement plans, retirement income strategies, general financial and estate planning, investments, saving for education, and investments and portfolio management. Dave feels that his success is measured by his clients' ability to achieve financial independence while seeking the quality of life they desire.

Early in life, Dave attended schools for engineering and aeronautics, and worked as a commercial pilot in the 1990s. He later decided to move into financial services and attended UCLA's Anderson School of Management with an emphasis on business retirement plans. Dave went on to attain multiple accreditations and certifications through the College for Financial Planning.

Dave has received the Ameriprise Community Impact Award and the Protect, Grow, Give Award from the RiverSource Life Insurance Company. Passionate about music education, he supports Rock Central, a non-profit community music school, and has served on their board of directors since 2012. He has also served on the board of education for Big Foot Union High School from 2007 to 2011.

When he is not at the office Dave enjoys golfing, boating, listening to music, cooking, traveling and watching sporting events. He and his wife Lisa have four children, four grandchildren and a Maltipoo. His favorite travel destination is the British Virgin Islands. If he could interview any individual – living or deceased – Dave would choose former Supreme Court Associate Justice Antonin Scalia.

AREAS OF FOCUS

Retirement Plans (individual and business), Asset and Wealth Management, Long-Term Care Strategies, Individual, Family and Business Owner Financial Planning

CERTIFICATIONS and ASSOCIATIONS

- » Chartered Retirement Planning Counselor (CRPC®)
- » Accredited Portfolio Management Advisor (APMA®)
- » Certified 401(k) Professional (C(k)P®)
- » Chartered Retirement Plan Specialist (CRPS®)
- » Accredited Asset Management Specialist (AAMS®)
- » Certified Long-Term Care Specialist (CLTC®)
- » Certified Plan Fiduciary Advisor (CPFA)
- » Member, Financial Planning Association (FPA)
- » Member, National Association of Plan Advisors (NAPA)
- » Member, American Retirement Association (APA)



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