



Financial Advisors of Delaware Valley

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**Financial Advisor**

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***“Remember, no one plans to fail . . . but we have found many situations where people have failed to plan. Let us help you set and achieve your financial goals.”***

David Kressler

David Kressler and his team provide the following services for their clients:

**1) Corporate Wealth Management Services for Business Owners**

- Succession Strategies & Buy-Sell Funding
- Employee Benefit Plans
- Retention Strategies for Key Executives
- Qualified & Nonqualified Retirement Plans

**2) Family Wealth Management Services**

- Risk Management and Disability Income Protection
- College Funding Techniques
- Retirement planning to help maintain current lifestyle through retirement
- Estate Planning Assessments
- Investment Strategies designed to achieve financial goals

With over twenty seven years of combined financial and managerial expertise, Dave and his team of professionals know how to help you design, implement and accomplish your personal and business objectives and will be there for you every step of the way. They have extensive knowledge and experience to help their clients protect and grow their wealth, preserving a lifestyle now and for the future.

Dave earned his M.A. and Ph.D. from the University of Michigan and for over a decade, has taught Business Strategy and Portfolio Valuation at the University of Maryland's Smith School of Business.

The Washington Post, WMAL Radio, as well as Smith School faculty have interviewed Dave for his expertise on business and investment strategies. Dave's professional affiliations include membership in the National Association of Insurance and Financial Advisors (NAIFA), the prestigious Million Dollar Round Table (MDRT) and the Principal Financial Group® Leader's Club. Believing it's very important to serve the community, Dave presently serves on the Boards of the Healthcare Initiative Foundation and the Montgomery Hospice. Dave and his team work to strike a balance between your present needs and your future objectives; between investment risk and investment return; between current income and wealth accumulation.

Insurance issued by Principal Life Insurance Company and the companies available through the Preferred Product Network, Inc. Securities and advisory products offered through Princor Financial Services Corporation, 800/247-1737, member SIPC. Principal Life, the Preferred Product Network and Princor® are members of the Principal Financial Group®, Des Moines, IA 50392. Agent Name, Principal Life Financial Representative, Princor Registered Representative, Investment Adviser Representative.  
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