Dave Viola

Senior Financial Advisor

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Success in life is determined by where you finish, not where you start.

David's 40-year industry tenure is a perfect example of this adage. He started as a stockbroker for Dean Witter Reynolds after graduating from Ursinus College with a degree in economics.

Soon after, a deeply personal experience forced him to reevaluate his career, leading him to invest his efforts with greater purpose: helping people understand and reach their financial goals.

Invaluable Experience

David's longevity means he has been through many market booms and busts. For any investor, that type of professional experience should inspire confidence.

But just as important—and potentially overlooked—is his life experience.

He has lived through most of the same major milestones his clients have or will experience: Getting married, buying and selling homes or investment properties, saving for his children's education, handling his parent's estates, executing strategies to keep taxes in check, preparing for retirement and creating estate planning strategies.

His "been there, helped with that" mentality, along with his extremely relatable personality, nurtures the confidence clients need when making major financial decisions.

Educating and Celebrating

Caring. To David, this is his number one responsibility. It also happens to be his favorite part of his career.

Educating clients, making sure they understand every potential pro, con, or risk. These are the conversations he looks forward to most, because these can have the power to change a client's life. And you can count on him to celebrate with you as each goal is met.

Outside the Office

David is actively involved in his Church and the Christian Business Community. He has been active in building homes for the poor in Guatemala and currently serves on the Board of Directors for a Community group in Haiti.

Happily married for 30 years, he and his wife are proud parents of three children, the oldest adopted from Guatemala and the youngest from China.