Who is The Expert Network?

The Expert Network is an invitation-only online brand and reputation management community of business owners and professionals in the fields of law, medicine, wealth management, and real estate that have demonstrated exceptional leadership in their industries. Members include prominent doctors conducting novel research, lawyers winning millions of dollars for their clients, top-producing and accomplished realtors, recognized wealth managers, financial advisors, and top executives.

Congratulations DWA, for earning the coveted Expert Network Award for excellence in service, client retention and culture.

David White & Associates
dream, grow, protect, enjoy

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David White & Associates

Is “On the Grow”

Who do you know?

David White & Associates

Who is DWA?

Our business begins with dreams. Dreams as essential as security, as grand as growth, allowing one to pursue passions. Dreams to start a new life, begin a family and protect what is precious. To begin a business, retire in comfort or leave a legacy. We at David White & Associates (DWA), have the strategies to assist you in making your dreams come true.

Since 1971, DWA has, thru our comprehensive planning process, assisted clients in selecting a wide variety of products to fulfill their goals and objectives. With over 20,000 clients, we manage over 1 billion in assets as well as 4 billion of life, long-term care and disability insurance programs.

DWA is one of the largest independent planning organizations in the San Francisco Bay Area. Our value system is client directed and we strive to consistently "do the right thing".

Everyone has a plan, either by design or by default. One of the values we help bring to our clients is that we are a network of seasoned advisors.

Our Qualifications

With pride, our team of credentialed Financial Service Professionals include:

- 7 Certified Financial Planners
- 26 Investment Advisor Representatives
- 5 Chartered Life Underwriters
- 5 Chartered Financial Consultants
- 9 Life Underwriter Training Council Fellows

We offer a diversity of knowledge and experience and uphold a team approach to our process.

Community is important to David White and Associates. We continue our desire to give to the community we serve more than just financial services. We donate money and time to dozens of charitable organizations and foundations each year. Our commitment to giving back is and always has been a large part of who we are.

Advisor Training

How do we help our advisors launch their career?

Monday Classes -Advanced
- Business & Estate Planning Concepts

Tuesday-Fundamentals
- Investment and insurance processes, practice management, business planning basics

Sales Builder
- Monthly think tank with other advisors, marketing, accountability

FSEdNet
- Online product, sales, process training

Trustworthy Selling
- 13 Week class to advance on emotional selling

Women in Financial Services
- Webinars, mentorship, leaders convention

Ameritas New Advisor Training School
Ameritas Advanced Markets
Virtual Assistant
- Personalized website, brochures, presentation pieces

Weekly Management Meetings
- Goal and case preparation review

MDRT & Leaders Conferences
Financial Planning Software
CFP, ChFC, LUTCF Reimbursement Programs

Mentoring

While our training system produces some of the most knowledgeable advisors, knowledge is not power. It's the application of this knowledge that is powerful. At David White & Associates, 70% of our business has 2 advisors working together. Whether you are new to the business and don't know what you don't know, or more experienced and know what you don't want to do, don't overlook the opportunity.

By learning in the field with experienced advisors, your practice grows much faster and you can trust that clients are getting the best advice while your education continues.