

WHO IS DWA?

Since 1971, David White & Associates has been trusted to provide financial planning advice throughout the Greater Bay Area. We offer valuable planning services for individuals, small business owners and Fortune 500 company executives. Located in San Ramon, CA, our firm manages over \$650 million dollars for our clients.

We are wealth accumulation and income distribution advisors, not captive to any one idea, service or product.

Our credentialed and skilled Financial Professionals strive to build relationships with each client in order to provide guidance to help navigate today's complex financial decisions. We use a synergistic approach to coordinating your tax, legal and wealth strategies while working closely with your attorneys and tax professionals. Our mission is to offer dedicated, creative and professional financial problem solving.

Resource Guide for Accountants and Attorneys

Overview

Securities and investment advisory services are offered solely through Ameritas Investment Corp. (AIC). Member FINRA/SIPC. AIC and David White & Associates are not affiliated. Additional products and services may be available through David White & Associates that are not offered through AIC. Representatives of AIC do not provide tax or legal advice. Please consult your tax advisor or attorney regarding your situation.



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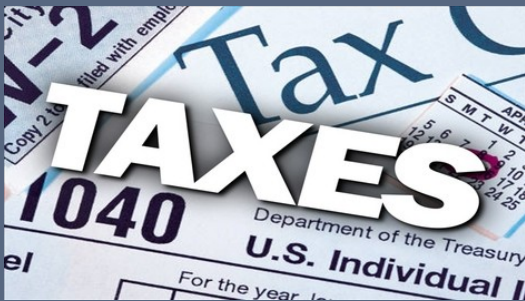
dream, grow, protect, enjoy

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David White & Associates

David White & Associates has put together a Resource Guide for Accountant's and Attorney's to help you in certain areas with your own clients.



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Let us know how we can help you further.

Teamwork helps in getting the job done.