



David C. Johnson

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David Johnson is an insurance planning specialist, an accomplished author and instructor with over 40 years of experience in wealth management, estate planning, tax planning and insurance design. David collaborates with wealth management teams to help Financial Advisors develop wealth transfer, estate planning and insurance strategies for their clients.

David began his career in 1976 as a Certified Public Accountant in a local practice in Cedar Rapids, Iowa, servicing privately-held business clients in tax planning and financial reporting. The practice was later expanded to include employee benefit plans, gift tax planning as well as planning for estate taxes. In 1981, David joined a financial planning firm where he provided estate tax analysis for wealthy client which naturally transitioned into analysis of his clients' life insurance, a key tool in wealth transfer planning. David became a well-known analyst in the life insurance industry in the design and use of life insurance products for personal financial planning.

In 1985, David authored a book, *Insurance: A Tool in Personal Financial Planning*, as well as an eight-hour Continuing Professional Education course of the same name for the American Institute of Certified Public Accountants. For the next two years, he toured the United States teaching the course to CPAs across the country. At the completion of his tour, David collaborated with a national group of planning professionals to design, develop and distribute a suite of financial planning tools.

In 1991 David moved his family to Colorado and partnered with financial advisors consulting with clients in the use of life insurance.

Previous Experience:

Morgan Stanley Smith Barney: 1998-2011

EDUCATION

- Coe College, Cedar Rapids, Iowa, B.A. Business Administration
- Certified Public Accountant
- Life insurance licenses in several states
- FINRA Series 6, 63 & 65