

David Birnbaum

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David Birnbaum joined Wells Fargo Advisors as a Financial Advisor and Portfolio Manager in April 2016. David's practice focuses on being the preferred financial services provider to high net worth individuals, entities and their legal and accounting firms nationwide. David's eclectic background and professional experience enable him to better understand the demands of entrepreneurs and the intricacies of their multinational operations.

A graduate of the State University of Buffalo with a Major in Economics and a concentration in Environmental Studies, David first worked as an in-house analyst at IPMC (now Multi-Vest Options), where he researched and wrote market reports on commodities.

David then created an overseas business that manufactured ready-to-assemble furniture which was to be sold to the big-box retailers such as Home Depot. Most of the manufacturing was done in Romania before the fall of the Soviet bloc. After the fall of communism, David developed the first – ever joint venture in the former Soviet bloc. David was Romark S. A.'s founding President and CEO. David's vast experience includes financial advisor roles at UBS, Smith Barney's high net worth group, and most recently as an Executive Director – Investments and Portfolio Manager at Oppenheimer & Co.

Making sure your wealth continues to work in support of the goals you have established takes careful planning. Such planning is not a single event – it is a process. As your life circumstances change, so must the investment strategies I use to stay on course toward meeting your objectives. That is why I work with you, your CPAs and attorneys to design investment strategies targeted to your specific needs.

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