David L. Zahn, CPA, CFP®

DIRECTOR OF CORPORATE RELATIONS, SENIOR RELATIONSHIP OFFICER, MANAGING DIRECTOR, SHAREHOLDER

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Service Areas

Family Governance and Education

Philanthropic Services

Personal Touch

Fiduciary Services

Wealth Planning

Education

University of Houston, BBA, *cum laude* (2007)

Certifications

CERTIFIED FINANCIAL PLANNER™ Certification (2015)

Certified Public Accountant (2009)

David leads the delivery of investment, planning, fiduciary, administrative, and family office services to a select group of clients with a special interest in family foundations and family philanthropy.

Previously, David practiced as a tax accountant for seven years at regional firms that managed the tax, audit, and general accounting needs of wealthy families and their closely held businesses. He then formed his own tax advisory firm to offer strategic advice and family office services before joining Sentinel Trust.

David is also an instructor in Rice University's financial planning program and teaches income tax strategy to students sitting for the CERTIFIED FINANCIAL PLANNER™ exam.

Professional Background:

- Managing Member, Smith & Zahn CPAs, PLLC, Houston, TX (2013–2014)
  Responsibilities included managing a local public accounting firm to serve the tax and accounting needs of high-net-worth individuals and closely held businesses.
- Tax Accountant, Carolyn Allen CPA, PC, Houston, TX (2010–2013)
- Staff, Maddox, Thomson, & Associates, PC, Houston, TX (2009–2010)
- Staff, Weinstein Spira & Company, PC, Houston, TX (2007–2010)

Professional Organizations:

- Houston Estate and Financial Forum, Board Member
- Houston Business and Estate Planning Counsel, Member
- Texas State Board of Public Accountancy, Member

Community Involvement:

- Rice University CFP® Certification Education Program, Instructor
- Catholic Charities of the Archdiocese of Galveston-Houston, Board of Directors and Audit Committee Chair
- Houston Business and Ethics Forum, Member

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- Holocaust Museum of Houston, Audit Committee Member

Talks:

- "Accounting for Fiduciary Entities," Texas Banking Association's Graduate Trust School, July 2020 and July 2021
- "Personal Trust Administration from A to Z," Midland College Foundation & Midland Memorial Foundation Estate Planning Seminar, October 2021

