



David L. Zahn, CPA, CFP®

SENIOR RELATIONSHIP OFFICER, SENIOR VICE PRESIDENT, SHAREHOLDER

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Service Areas

Family Governance and Education

Philanthropic Services

Personal Touch

Fiduciary Services

Wealth Planning

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.

Education

University of Houston, BBA,
cum laude (2007)

Professional Background:

- Managing Member, Smith & Zahn CPAs, PLLC, Houston, TX (2013–2014) – *Managed 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)

Certifications

CERTIFIED FINANCIAL
PLANNER™ Certification
(2015)

Certified Public Accountant
(2009)

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, Former Instructor
- Houston Livestock Show and Rodeo, Commercial Exhibits Committeeman
- Catholic Charities of the Archdiocese of Galveston-Houston, Young Leaders Board Member

- Casa de Esperanza Young Professionals, Former Member
- Young Catholic Professionals (YCP) Houston, Former Board Chairman
- Knights of Columbus, Member

Talks:

- “Accounting for Fiduciary Entities,” Texas Banking Association’s Graduate Trust School (July 2020)