



Professional Financial Advisor

David L. Kaiser, ChFC[®], AIF[®]

David Kaiser is founder of Pinnacor Financial Group, a financial services firm based in Denver, Colorado. A financial professional since 1994, David offers personalized, objective advice and comprehensive financial planning services through Securities America Advisors, for individuals, couples and small business owners.

David's attention to detail is impeccable as he reviews a client's current financial situation, risk tolerance and personal priorities. Only then does he suggest appropriate financial strategies to help them set and realize their lifetime goals. As a result, he has gained a reputation in the Denver area for his commitment of service to clients.

Prior to establishing his own financial services firm, David gained valuable experience as a financial advisor and district manager for Waddell & Reed. He was also a financial advisor for members of the IBM Credit Union in Boulder, Colorado.

David has earned the Chartered Financial Consultant (ChFC[®]) designation enabling him to effectively apply a comprehensive financial planning process to his clients' needs. To attain the ChFC designation, awarded by the American College of Bryn Mawr, advisors must have at least three years of experience in the financial industry. In addition, they are required to complete course work and pass an examination covering the fundamentals of financial planning, including income tax, insurance, investment and estate planning. David has also earned the Accredited Investment Fiduciary[®] (AIF[®]) professional designation, awarded by the Center for Fiduciary Studies, after receiving formal training in investment fiduciary responsibility.

Passionate in his efforts to educate the community about the need for financial planning, he is a co-host of TheWealth Building Hour, a daily radio talk show on The Radio Colorado Network AM1060. David's firm participates in an intern program for local college students, as a way of improving financial literacy among young adults.

Securities offered through Securities America, Inc. Member FINRA/SIPC, David L. Kaiser, Registered Principal. Advisory Services offered through Securities America Advisors, Inc. an SEC registered investment advisory firm, David L. Kaiser, Investment Advisor Representative. Pinnacor Financial Group and Securities America are not affiliated.

Practice Focus

- Retirement Planning
- Investment Management Strategies
- Asset Allocation
- Tax Reduction Strategies
- College Funding
- Estate Planning Issues
- Small Business Consulting

Education/Certifications

- Chartered Financial Consultant (ChFC[®])
- Accredited Investment Fiduciary[®] (AIF[®])

Affiliations

- Better Business Bureau
- Wiser Advisor
- Registered Principal, Securities America, Inc.

Media Resource

- Co-host, Daily Financial Radio Talk Show Business for Breakfast, "The Wealth Building Hour" – The Radio Colorado Network AM1060.



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