DAVID L. BLAIN

CHARTERED FINANCIAL ANALYST (CFA)
FINANCE EXPERT
FIDUCIARY
WEALTH ADVISOR
ENTREPRENEUR

DAVID AT-A-GLANCE

- Founder, CEO, and Senior Wealth Advisor at BlueSky Wealth Advisors, a fee-only, fiduciary, Independent Registered Investment Advisor founded in 1999
- Author of ***Invest in Your Life, Not Just Your Portfolio: A Guide to Achieving Financial Independence***
- Distinguished Honors Graduate of United States Military Academy at West Point
- Served 10 years with distinction in U.S. Army. Unit Assignments included 82nd Airborne Division Ft Bragg, NC; 2nd Battalion, 75th Ranger Regiment, Ft Lewis WA; US Army Special Operations Command (USASOC) & US Army JFK Special Warfare Center & School; Ft Bragg, NC
- Led the West Point Rugby Team to its first- ever NCAA final four appearance in 1989. Selected for the traveling All Army and Combined Services Select Rugby Teams
- Focuses volunteer efforts on helping veterans, and youth, and supporting faith-based programs
- An engaging storyteller, he is easy to connect with, gives compelling interviews and public speeches, and previously hosted his own radio and TV Show, All Things Money with David Blain.
- Lives with his wife Caroline and five children, ages 8-18, in Trent Woods, North Carolina
- CFA Charter-holder member of CFA Institute for 16 years

AREAS OF EXPERTISE

- Creating financial independence by generating multiple passive income streams
- Advancing tax strategies designed to minimize clients' lifelong taxes
- Leaving a meaningful legacy to future generations
- Building and managing real estate portfolios
- Designing and implementing evidence-based stock and bond strategies
- Creating planning and growth strategies for small business owners
- Specializing in medical practitioner practice management and income optimization
- Designing company pension plans and estate plans that simplify the complex
- Creating meaningful philanthropy and charitable giving strategies

CAREER HIGHLIGHTS

- Joined the National Association of Personal Financial Advisors (NAPFA) in 1999 and has been an advocate of fiduciary financial planning and investing for over 20 years
- Founded BlueSky Wealth Advisors, now serving clients in 27 states and 5 countries worldwide
- Directly advises top executives from various Fortune 500 companies around the country
- Featured in or written over 300 financial articles since 1999
- Successfully completed two multimillion-dollar acquisitions of wealth advisory firms in Silicon Valley in 2013 and 2015
- Advises clients on over 2 billion in assets, including liquid assets, real estate, and closely-held businesses
- Successfully advised numerous business owners in selling their companies
- Vice Chairman of the Board of Directors for CarolinaEast, a nationally recognized hospital facility
- Chairman of the Investment Committee for CarolinaEast overseeing the retirement plan for all employees, including oversight of the 403(b), 457, Money Purchase Pension Plan, VEBA, and capital reserve fund
- Published Invest in Your Life, Not just Your Portfolio, 2018

MILITARY HIGHLIGHTS

- Graduated from the Infantry Officer Basic and Advanced course, Airborne School, The Survival, Evasion, Resistance, and Escape (SERE) schools, Ranger School, Special Forces Assessment and Selection Course, Jungle Warfare School, and Special Forces Russian Language School
- Earned many awards including The Combat Infantryman's Badge, The Master Parachutist Badge, The Ranger Tab, and The Bronze Star Medal for actions in Iraq
- Made over 350 parachute jumps
- Served in combat zones or involved in deployments to Iraq, Panama, Bosnia, Liberia, Somalia, Kuwait, and Saudi Arabia
- Trained with the British Special Air Service (SAS)
- Developed Special Operations war plans for Iraq, Iran, and the Middle East as well as the Europe theater, late 1990s

SPEAKING ENGAGEMENT TOPICS

- The best investment you can make
- 5 basic habits for financial success
- Financial planning: How to retire early, own a beach house, or fund a hospital wing in your name
- The value of a sensible financial strategy
- What to know before jumping into real estate investing
- Nothing is certain but death and taxes
- Seven tips to prevent medical practice shortfalls
- How to determine the value of financial advice
- Small business financial traps
- Why should you diversify?
- 401(k)s: Getting more out of your plan
- Estate planning: Leaving a legacy for the next generation
- Biggest mistakes investors make

Recurring Guest Speaker

- REI Diamonds Podcast with Dan Breslin
- Sharkpreneur with Seth Greene and Kevin Harrington

AREAS OF INTEREST

I love spending time with my wife, just hanging out talking about our dreams and future together. We thoroughly enjoy raising our five children. I coach several youth soccer teams and spend time with our kids doing whatever interests them. It's an absolute joy. We spend a lot of time on the water in our boat or exploring this great country in our motor coach. When I get a few minutes alone, I'm usually reading a book or working out. I'll watch any type of motorsport, and I like to get behind the wheel and do a little race car driving, too.

ENDORSEMENTS

Do you have someone that you could count on to take care of your family and your finances if something happened to you? David earned that position in my life.

- Kevin Bell, Client of BlueSky Wealth Advisors

I have known and worked with David for numerous clients and am always impressed with his dedication, acumen, and good business sense. I can think of no better author or example who good investment advisors can model than David.

- Alan Gassamn, JD, LLM

A lifelong learner, his interest and respect are sincere. David has been a trusted mentor to me for more than thirty years. Few people I've met rival his practical mix of discipline, industry, and devotion to greater purpose. With the courage to defy convention, and to live the life of his own design, David never compromises on principle. Two things you can count-on: his wise counsel comes from a place of love, and he walks the same path he endorses.

- W. John Oliver, Managing Partner, Battle Monument Group

POTENTIAL INTERVIEW QUESTIONS:

MILITARY BACKGROUND:

1. What fueled your desire to attend West Point and join the military?
2. What was your greatest challenge while serving in the military?
3. What do you feel was your greatest achievement during you military career?

FINANCIAL ADVISOR:

1. What was the catalyst for such a big transition from Army guy to financial advisor?
2. When working with clients, what sets you and your firm apart from the rest?
3. What's next for you in this arena?

ENTREPRENEUR/BUSINESS OWNER:

1. Have you always had the desire to be an entrepreneur or did that inclination develop from a need in the marketplace?
2. What has been the most rewarding aspect of being an entrepreneur/employer?
3. How do the rigors of West Point and Special Forces translate into the demands of being an entrepreneur?
4. What is next for you as an entrepreneur?