



David E. Hackney, MBA, CPA, CFA
Managing Director – Sr. Wealth Manager

David is responsible for ensuring our family office and institutional clients receive world-class service. He provides a unique worldwide view on global investments based upon his residing and working in Asia, Europe and the United States. The team prides itself on superior service and with this goal, David is available to address client suggestions for improvement in this regard. David brings his international experience to our wealth management clients.

David's international experience complements the Firm's worldwide expertise, having spent 20 years with PricewaterhouseCoopers as Partner and Head of Corporate Finance/Investment Banking in Warsaw, Poland, along with working in Prague, The Czech Republic; London and Birmingham (UK); and Los Angeles, California. He has substantial experience in valuing and structuring equity and debt, mergers & acquisitions, debt reconstruction, multi-million dollar finance raising, and has performed a lead financial adviser role on IPO's, and purchases and disposals of companies. He has assisted in the negotiation of London Club debt between the Kuwait and Croatia governments.

His professional experience is complemented by an MBA in International Finance from The Wharton School of the University of Pennsylvania. He is a CPA, as well as a Chartered Financial Analyst (CFA) Charter Holder. The CFA qualification is one of the most respected qualifications among Wall Street Investment Analysts.

David enjoys the fellowship and service to the community of Rotary, having been an active member in Shrewsbury, England, and is now involved with the Downtown Appleton Club in Wisconsin. In addition, he feels honored to be a Board Member and Director of Goodwill Industries of North Central Wisconsin, based in Menasha, Wisconsin, because of the organization's vibrancy and success in providing a variety of services to the local community when an individual's need is greatest. While living in Los Angeles, David was an Associate Director of the Foundation for People, a non-profit organization whose goal was to guide individuals on parole towards a life free from crime.

David met his wife Bridget, a citizen of the United Kingdom, while both were working in Prague for Price Waterhouse in the early 1990's. They have three children. One of the family's attractions to the Fox Valley is the family orientation towards athletics such as the Appleton Soccer Club and the related facilities at the USA Youth soccer and baseball fields.