TEAM MEMBER PROFILE

ASHTON THOMAS
PRIVATE WEALTH

David R. Andrews, CPA/PFS™, CLDP

Tax Advisor

David joined Ashton Thomas Tax Advisory in 2020 as a Tax Advisor. David is primarily focused on income tax preparation for individuals, trusts, and family-owned business interests. He also provides tax consulting services in conjunction with the firm's Advanced Planning function.

David grew up in Idaho, spending most of his early years in Idaho Falls. As a freshman at Brigham Young University in Utah, he took an aptitude test which demonstrated a strong likelihood of succeeding as a CPA. Plans to pursue a master's degree in organizational behavior led him to graduate with a bachelor's degree in sociology. However, David decided to pursue accounting anyway. Having had taken enough accounting classes to sit for the state merit exam, he successfully obtained his CPA. And the rest, as they say, is history.

After becoming a CPA, David went to work as an auditor for the state of Utah. A short time later, he decided to leave the public sector and move to Arizona for a public accounting role. He spent five years with Ernst & Young as a tax associate, then as a managing senior, primarily covering partnership clients. During this time, he also obtained an MBA from ASU with a focus in taxation, taking the maximum number of graduate classes covering taxation available at the time.

Following his stint with E&Y, David went to work in the corporate tax division of McGladrey & Pullen for a few years before being "hit by the entrepreneurial spirit." During this period of his life, he worked as a sole-proprietor tax preparer. Eventually, the entrepreneurial bug left him and he moved back to the corporate world taking a role as a tax manager at Best Western International, then spending time with a regional accounting firm, and eventually settling at cBiz as a tax consultant.

In 2007, David obtained his CPA/PFS™ (Personal Financial Specialist) designation to enhance his capabilities as a tax consultant. With cBiz doing a headcount reduction during the Great Financial Crisis, he took the opportunity to go back to the personal tax side working as an internal tax specialist Wealth Management International, a financial advisory firm in Peoria, Arizona. There, he worked with the firm's wealth management clients, as well as other tax clients. David obtained his Certified Legal Document Preparer (CLDP) certification from the Arizona Judicial Branch in 2019 to enhance his offering to wealth management and tax clients. He remained in that role until joining Ashton Thomas.

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"You have to know your client well enough to ask them about the things they won't tell you."

"You have to know your client well enough to ask them about the things they won't tell you," he says looking back on his years of experience in the field of taxation. He remains committed to this approach as he works alongside the wealth advisors and Advanced Planning team at Ashton Thomas.

David has served as a board member of the Deer Valley Education Foundation and the Central Arizona Estate Planning Council, as president of Surprise Grand Bell Rotary, and as a member of the Arizona Society of Certified Public Accountants' (ASCPA) financial planning committee. He is currently a member of the American Institute of Certified Public Accountants (AICPA®) and the Association of Certified Fraud Examiners (ACFE).

A resident of Phoenix, David is married to Julie, whom he met when he was "70 pounds younger." Together, they have two adult children, a daughter who lives in New York City and a son who lives in Arizona. David enjoys participating—he refrains from using the word "competing"—in 5K races and the occasional triathlon.