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Certified Financial Planner®

DAVID PLANTE, CFP®

Director of Relationship Development

ABOUT

David Plante is the Director of Relationship Development at John G. Ullman & Associates, bringing with him over 25 years of experience in the Financial Services Industry. Throughout his career, David has worked for both small companies and large firms, honing his expertise in developing relationships and strong connections both inside and outside of the organizations he has served.

In his current role, David is primarily responsible for leading his team along with the growth initiatives for JGUA. By taking a Relationship Based approach, he and his team start by meeting with potential clients to gain a full understanding of their goals, needs, and circumstances, before introducing the prospect to their lifelong financial advisor team.

David is highly committed to developing a strong relationship with the communities that JGUA serves, and has worked to develop an educational series for a wide array of organizations, from nonprofits to corporations. Originally from Salem, Massachusetts, he currently resides in Boiling Springs, Pennsylvania. David earned his Bachelor's degree in Business Administration with concentrations in Finance and Economics from Salem State University and is also a Certified Financial Planner (CFP).



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