

David Milkes

CPA / CFA

DIRECTOR OF M&A AND STRATEGIC ADVISORY | FINANCIAL INSTITUTIONS GROUP

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With more than 15 years of experience, David specializes in delivering merger, acquisition and strategic advisory services to financial institutions and related companies.

Starting his career in public accounting with Ernst & Young and hedge fund services with JP Morgan, David shifted focus to investment banking where he spent nearly a decade providing strategic advice to financial institutions and investment management organizations. In addition, he also spent time leading the strategic finance function and ultimate sale of a technology start-up company.

Today, David serves as a trusted advisor to clients providing strategic, financial and operational knowledge. His deep understanding of industry trends and current market activity helps clients overcome challenges and identify opportunities for growth. Fueled by his passion to see clients succeed today and beyond, he guides them through complex mergers and acquisitions, ownership restructures and business valuations, as well as developing succession, strategic business, financial and operational plans.

Committed to helping institutions strategize and identify opportunities, David frequently presents at various industry associations where he provides valuable insights into current market activity, ways to enhance services, drive member value and capitalize on opportunities.

David works alongside clients to gain an understanding of their short- and long-term goals, and tailors his approach to help achieve them. His ability to simplify complex transactional matters and strategic business plans empowers clients to make impactful decisions that help drive their long-term success.



I am passionate about working with clients to help them strategize, navigate complex transactions, and ultimately help them achieve their goals and objectives.

David Milkes

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Education

Bentley University

- MAcc
- B.S., Accountancy

Certifications

Chartered Financial Analyst (CFA)

Certified Public Accountant (CPA)

FINRA Licensing Series 7, 63 and 79

Affiliations

CFA Society Boston

CFA Institute

Industry Specializations

Banks

Credit unions

Credit union service organizations

Financial technology

Investment management organizations

Insurance

Mortgage companies

Wealth management