

David Amar

David is a Private Wealth Advisor, Senior Portfolio Manager and Global Institutional Consultant with the Private Banking & Investment Group at Merrill Lynch. A Senior Portfolio Manager can help clients pursue their objectives by managing on a discretionary basis his own Personalized or Defined Strategies, which may incorporate individual stocks and bonds, Merrill Lynch model portfolios, and third-party investment strategies. A Senior Portfolio Manager may make their strategies available to clients working with other Merrill Lynch Advisors.

David has been in the financial services industry since 1996 and his extensive background as an investment and tax advisor allows him to advise some of the firm's most sophisticated clients. Prior to joining Merrill Lynch, David was a Senior Banker in the Los Angeles office of J.P. Morgan Private Bank. Before moving to Los Angeles, David headed J.P. Morgan's Atlanta office where he was responsible for a team of 40 people and led a significant business expansion in the southeastern United States.

Before joining JPMorgan, David practiced at Arthur Andersen LLP where he specialized in issues surrounding the use and taxation of sophisticated financial instruments for purposes of optimizing a client's investment portfolio.

David is a holder of the right to use the Chartered Financial Analyst™ designation and is an active member of the CFA® Institute. In addition, David is a Certified Public Accountant in the state of California and is an active member of the American Institute of Certified Public Accountants. He serves on the board of Goodwill Southern California.

David earned a B.S. in Accounting from Syracuse University. He holds the Series 7, 9, 10, 63 and 65 FINRA registrations.