QuadCap WEALTH MANAGEMENT

www.quadcapwm.com



David Blair, J.D., E.A.

CEO, FOUNDING PARTNER

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Services

- Investment Management
- Tax Planning and Preparation
- Employee Benefits
- Estate Planning
- Legacy Planning
- Retirement Planning
- Family Office

Credentials

Juris Doctorate

Education

Southern Methodist University, Juris Doctorate, *magna cum laude*

Siena College, BBA in Accounting

Overview

David J. Blair, J.D., is the President, Principal, and founder of QuadCap Wealth Management, LLC. David started QuadCap in 2009 with the single goal of creating a firm that provides a truly personal service with client satisfaction being the guiding principle.

With more than twenty-five years of experience, David is dedicated to helping individual investors navigate their financial journeys with care and expertise. David creates thoughtful and comprehensive strategies for clients, spanning investments, estate plans, and trusts, wealth transfer planning, tax strategies, employee benefits optimization, retirement planning, and risk mitigation.

Before launching QuadCap Wealth Management, LLC, David honed his skills at The Ayco Company, a subsidiary of Goldman Sachs, where he served as Vice President of Financial Counseling for the southwestern region. There, he worked closely with CEOs, CFOs, and top executives of Fortune 500 companies, providing personalized financial guidance and asset management. David also served as President of an energy broker-dealer based in Dallas, overseeing daily operations and leading a dedicated team of representatives.

His commitment to excellence, combined with his deep knowledge and approachable demeanor, inspire trust and confidence among his clients and colleagues alike and have made him a sought-after speaker at national investor conferences.

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