PRECEPT
WEALTH MANAGEMENT

David Farrell, MBA, *CRPC* ®
Vice President, Senior Wealth Strategist

Texas A&M University
MBA
Merrimack College
BS, Finance

David has over 25 years of experience in the financial services industry. He helps clients pursue their financial goals as an Independent Investment Advisor Representative which allows him to offer unbiased advice and services to meet the needs of his clients. Acting as a fiduciary, David is focused on putting his clients first.

He first experienced the investment markets working on the floor of the Boston Stock Exchange. David later served on the trading desk of one of the country's largest Commodity Trading Advisor firms. Trading in markets from Australia, Japan, Europe, and the U.S. enhanced his understanding of the interconnectedness of financial events. Those trading strategies encouraged him to develop a systematic and impartial approach which still influences the way he serves clients.

David received his BS in Finance from Merrimack College and an MBA from Texas A&M University. As part of his on-going effort to stay connected on the issues confronting his clients, he became a Chartered Retirement Planning Counselor (CRPC). David has contributed his services as a volunteer providing financial counseling to entrepreneurs through the Small Business Development Center. He has served in various positions with his local Chamber of Commerce and was a charter supporter of the Seniors with Dignity Resource Center.

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As a regenerated believer whose faith has shaped his character, he strives to counsel clients with honesty, sincerity and integrity.

David resides with his wife and three children in Harris County.

www.preceptwm.com
dfarrell@preceptwm.com
(281) 973-9290

19506 US 59 N
Ste 315
Humble, TX 77338