

David Ritter, CVA, MBA

Professional Experience

David Ritter is a Shareholder in the firm's Financial Institutions Group. He has worked with credit unions, banks, mortgage companies and CUSOs to help build strategies and move quickly toward their financial goals.

Whether he is establishing a well-planned business strategy, providing his expertise on financial modeling, due diligence, financial analysis, or delivering project management budgeting and forecasting, clients can find confidence in knowing David's experience and adaptability will lead to a successful outcome.

David provides a multitude of advisory services to clients, including merger and acquisition guidance, business valuation and strategic planning. From prospecting merger opportunities for clients, to establishing effective financial and operational negotiations for new business, to deal closing and post-merger integration, he is completely hands-on in the entire merger and acquisition process. David also helps clients understand the true value of their business through a wide range of investment, branch, goodwill, mortgage rights and financial valuation services.

Education and Certifications

- Master of Business Administration – Carnegie Mellon, Tepper School of Business
- Bachelor of Arts, Business Economics – University of California, Santa Barbara
- Certified Valuation Analyst (CVA)
- Series 63 and 79 Securities Licensed

Memberships and Affiliations

- National Association of Certified Valuation Analysts
- Various local, state and national financial institution associations



Shareholder Financial Institutions Group

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Areas of Expertise

- Financial Institutions
- Mergers and Acquisitions
- Strategic Planning
- Business Advisory