

David Milkes, CPA, CFA

Professional Experience

David Milkes is a Director in Doeren Mayhew's Financial Institutions Group, where he leads the mergers and acquisitions and strategic advisory practice for credit unions, banks, investment management organizations, broker dealers, mortgage companies, CUSOs and other related financial entities.

Drawing on nearly 15 years of experience, David is a trusted advisor to many clients providing strategic, financial and operational knowledge. His experience includes guiding clients through complex mergers and acquisitions, ownership restructures and business valuations, as well as developing succession, strategic business, financial and operational plans.

Prior to joining Doeren Mayhew, David was an investment banker with Colchester Partners for nearly a decade providing strategic advice to financial institutions and investment management organizations. David's earlier career included time in public accounting with Ernst & Young and hedge fund services with JP Morgan.

Education and Certifications

- Master of Science, Accountancy – Bentley University
- Bachelor of Science, Accountancy – Bentley University
- Chartered Financial Analyst (CFA)
- Certified Public Accountant (CPA)
- FINRA Licensing Series 7, 63 and 79

Director of M&A and Strategic Services

Financial Institutions Group

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Areas of Expertise

- Mergers and Acquisitions
- Ownership Restructures
- Succession Plans
- Strategic Advisory
- Business Advisory
- Business Valuations