

David M. Duttenhofer, CFP

Professional Experience

Present Investment Advisor CA # 131386
Certified Financial Planner (CFP)
2004 – Present-Fee-Only Registered Investment Advisor

1990 – 10/2004 J.K.R & Co. Inc., Laguna Beach ,CA

Vice-President

- Securities Principal
- Municipal Bond Principal (MSRB)
- Options Principal
- Options Supervisor

1987 - 1990 Prime Financial Securities, Laguna Beach, CA

- Managing Partner, Owner
- Principal and Resident Manager
- Supervisor

1971 – 1987

Securities Representative

Stock, Bond, and Mutual Fund Sales

- Young Smith & Peacock
- Wagenseller & Durst
- Dean Witter
- PaineWebber
- Mitchum, Jones & Templeton

Professional Associations

2005 – Chairman of the Board-FPA Orange County Chapter
2004 – President, Financial Planning Association- Orange County Chapter
1998 –2005 Board of Directors-FPA-OCC
2002 – Present Laguna Canyon Foundation,
Estate Planning and Gifts Committee

Education

1996 – Passed CFP Comprehensive Exam and Certified
1993 – 1996 College of Financial Planning, Denver, CO
1965 – 1969 CA State University, Fresno & Fresno City College

Activities

2003, July 14 - Hiked Mt. Whitney