

David Colton

Partner, Director of Client Service
Development & Advisor

As a Partner and Director of Client Service Development, David leads the development and training of the client service team's skills, knowledge and expertise.

David joined Gresham in 2009 and leads the development of Gresham's client advisory team by designing training programs, resources, and processes that equip Gresham Advisors with the skills, knowledge, and expertise needed to deliver exceptional advice and a consistent client experience. In addition, David oversees Gresham's relationships with CPA firms across the country while continuing to serve as an Advisor to a select group of clients, advising them on the complex investment, tax, estate, philanthropic, and governance issues that accompany significant wealth.

A former attorney at Shaw Pittman and a CPA with PricewaterhouseCoopers and Ernst & Young's National Tax Department, David draws on a broad multidisciplinary background to advise clients on complex wealth transfer and planning strategies. His experience includes structuring the purchase of an NFL team and advising Andersen Consulting partners throughout the Americas, Europe, and Asia on incentive compensation and income and estate tax matters during the firm's transition from a partnership to the publicly traded company Accenture. Before joining Gresham, David was a vice president and lead advisor in Neuberger Berman's Boston office, where he advised some of the firm's largest client relationships. Earlier in his career, he was a partner and co-head of the Fiduciary Tax Practice at MFA, a New England CPA firm with more than 100 professionals, and served as chief investment officer for the firm's affiliated family office.

Outside of work, David enjoys hiking on well-marked trails and exercising with an Ultraslide Slideboard and a TRX Suspension Trainer.



CPA (inactive)



CERTIFIED FINANCIAL PLANNER™

EDUCATION BACKGROUND

- B.S., Accounting, University of Maryland
- J.D., *cum laude*, University of Baltimore School of Law
- LL.M., Taxation, New York University School of Law



Gresham

Gresham Partners LLC

Copyright © 2026 Gresham Partners LLC. All rights reserved.

May not be reproduced or distributed without permission.