AUSTIN WEALTH MANAGEMENT

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Bios

Financial planning you can count on.

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Danny Davila III, CPA

Managing Principal – Financial Planning

Danny is an entrepreneur, an innovative problem solver and a visionary businessman. His professional experience ranges from personal financial planning to forensic accounting and auditing the financial reports of large organizations. In the mid-1980s, Danny realized that the CPA professional was in an optimal position to provide critical financial guidance to families and businesses beyond tax advice. He has adapted his business over the years to meet the needs of his clients by recruiting specialists in accounting, tax, auditing, investments, insurance and general planning. He emphasizes personal relationships with his clients, allowing the firm to actively address their most important financial concerns, and personal goals.

As a tax advocate, Danny has guided clients through many IRS audits over the past 30+ years. As an auditor, he has been responsible for auditing small to large corporate clients, government and non-profit entities.

In 2011, Danny merged his wealth management business with an Austin-based independent financial planning company to expand his capabilities into advanced investment analysis, insurance and risk management, estate planning, and goals-based cash flow planning. In doing so, he has developed a succession plan to make sure his clients are taken care of well after his career is complete.

(written by Kevin X. Smith, Danny's partner)

Education

Texas State University, BBA, 1979
University of Texas at Austin, MPA, 1993

Experience

2009 – Present Managing Principal, Austin Wealth Management, LLC
1984 – Present President, Davila, Buschorn & Associates, PC
1982 – 1984 Associate, Bawcom & Associates
1979 – 1982 Accountant, Coopers & Lybrand

Professional Designations

CPA – Certified Public Accountant
Issued by: The Texas State Board of Public Accountancy
Prerequisites: Bachelors degree or higher, 150 hours of postsecondary coursework in accounting
Exam Type: Certification exam (14 hours, 4 sessions, proctored)
Continuing Education: 20 hours per year
More Information: http://www.tsbpa.state.tx.us/

CRC – Certified Retirement Counselor
Issued by: International Foundation for Retirement Education (InFRE)
Prerequisites: Bachelors degree or equivalent with 2 years relevant professional experience or high school diploma or equivalent with 5 years relevant professional experience
Exam Type: Certification exam (200-question, multiple choice, proctored)
Continuing Education: 15 hours per year
More Information: http://www.infre.org/CertifiedRetirementCounselor.shtml

PFS – Personal Financial Specialist
Issued by: The American Institute of Certified Public Accountants (AICPA)
Prerequisites: Member of the AICPA; Hold an unrevoked CPA certificate issued by a state authority; Have at least 2 years of full time personal financial experience or 3000 hours equivalent experience with the 5yr period
preceding PFS application
Exam Type: Final Certification Exam
Continuing Education: 60 hours of continuing education every 3 years.
More Information: www.aicpa.org/

Licenses

Series 7 and 63
Texas Life & Health

Background

Danny is an Austin native. His father and mother were restaurant and bar owners in downtown Austin. Danny often worked in the kitchen and in various other capacities. He learned a lot about what it takes to be a small business owner as he participated in every facet of the family run businesses.

After graduating from high school, Danny went south to San Marcos and Texas State University (then Southwest Texas State) to earn his bachelor degree in business. Shortly thereafter he found an entry level accounting job in Austin, worked his way up, and several years later was offered a partnership position to begin running the business. Danny never looked back.

Well into his professional career, Danny attended the University of Texas to earn his Masters in Public Accounting to broaden his skill set as a business person and CPA. There he learned valuable lessons about adapting to the needs of his clients and developing talented people around him. Since then, his practice has blossomed into four distinct operations working together: wealth management, tax preparation, auditing and consultancy.

Danny remains active in all segments of the practice, focusing on developing client relationships, continuing to adapt to a changing marketplace, and providing a wholesome environment in which to work.

Associations

American Institute of Certified Public Accountants
Texas Society of Certified Public Accountants
State of Texas HUB Certified
Beta Gamma Sigma Chapter Honoree – Texas State University, San Marcos (2010)

Community

Texas State University Accounting Advisory Council – Board Member
Texas State University Development Foundation Board – Past President
Texas State University Development Foundation Investment Committee – Past Board Member
Rotary International
Daniel and Lucy Davila Endowed Scholarship of Distinction – McCoy College of Business at Texas State University

Family

Danny and his wife Lucy are native Texans and have lived in the Austin area their entire lives. They have one son, Daniel Davila IV, who is a graduate of Texas A&M University, College Station. Lucy now lives the good life after spending 30+ years working for the Texas state government.

Three Favorite Places in Austin

1. Any good Tex-Mex restaurant
2. Downtown business district
3. Barton Springs

Menu

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Important Disclosure Information

Securities and advisory services offered through Triad Advisors Inc. Member FINRA & SIPC.

From AWM

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  Stuck in My Own Business

  09-12-2012

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  Going At It Alone

  09-12-2012

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  Great income, Lots of Debt – Now What?

  09-12-2012

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