



**CITRIN COOPERMAN®**  
Accountants and Advisors

## Dave Grumer, CPA

PARTNER

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NEW YORK CITY

(212) 697-1000



### EDUCATION

Bachelor's Degree, Bernard  
M. Baruch College of the  
City University of New York

### LICENSES

Certified Public Accountant  
in the State of New York

### SERVICES

Accounting Advisory  
Services

Audit and Attest

Commercial Tax Services

Financial Statement Audit

Reviews and Compilations

Tax Compliance

### INDUSTRIES

Broker-Dealers

Financial Services

Hedge Funds

"When I help a client solve a problem or plan for the future, I've had a great day."

Dave Grumer is a partner with more than 30 years of experience providing business consulting, tax, and audit services. A leading member of the firm's Financial Services Industry Practice, he advises clients primarily in the financial services industry, including registered investment advisors, registered brokers and dealers, and various investment companies.

### EXPERIENCE

Dave was previously a partner of Kaufmann, Gallucci & Grumer, LLP, which joined Citrin Cooperman in 2007.

Dave has a deep expertise working in the financial services industry. Staying abreast of the latest developments in accounting, taxation, and compliance, he helps clients with all facets of their financial statement and reporting needs, especially in regards to securities industry compliance. He also helps clients in preparing for new regulatory matters that arise and plan for new financial service business opportunities, and consults on how to improve efficiency and identify tax savings opportunities.

### PRESENTATIONS & PUBLICATIONS

Author, "Registered Broker-Dealer: Measurement of Credit Losses on Financial Instruments"

## AFFILIATIONS

Member, American Institute of Certified Public Accountants (AICPA)

Chair, New York State Society of Certified Public Accountants (NYSSCPA)

- Stock Brokerage Accounting Committee

Member, Securities Industry and Financial Markets Association's (SIFMA)  
Financial Management and Internal Audit Societies

## COMMUNITY INVOLVEMENT

Dave is a member of the United Way of Nassau-Suffolk's Allocation Committee and has held officer, treasurer, and board member positions at his Synagogue.