



JOHN W. DAVIS, CERTIFIED PUBLIC ACCOUNTANT (CPA), CERTIFIED FINANCIAL PLANNER™

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John is a Partner of Copper Leaf Financial. He is a graduate of the University of Vermont with a degree in accounting and is also an alumnus of the Leadership Champlain program in Burlington, Vermont. John is a CPA with 35+ years of experience in the financial world including both public accounting and financial planning. John works with business owners on succession planning to help facilitate the continued success of all areas of the business, including key people over time. He focuses on working with clients



to help achieve their short- and long-term financial goals – mindful of the need to adjust strategies as life circumstances evolve. John lives in Williston, Vermont with his wife Sand and has two grown children – Zach Davis of Williston, Vermont and Erin Davis of Tulsa, Oklahoma. In his spare time John enjoys golfing, skiing, gardening, and anything and everything dealing with entrepreneurs.

John earned the CFP® professional designation in 1982 and also had Series

7 licensing administered by the Financial Industry Regulatory Authority (FINRA), providing him with the qualifications necessary to make different types of trades with corporate securities.