

DAVID J. SHEPHERD, CPA, LLC

FIRM PROFILE

David Shepherd launched his firm in 2020 with twenty-five years of experience in both public accounting and the private sector. He sought to bring his passion for helping clients and caring about people to his own CPA practice, with unwavering dedication to customer service and value.

INDIVIDUALS, SMALL BUSINESSES, NON-PROFITS

Today, David works with individual clients, small business owners, and non-profits throughout Southern New England to help them minimize taxes and remain compliant, as well as to enhance overall operations – often strengthening internal controls and financial reporting – to improve profitability. He is experienced at audits of non-profits, HUD regulated entities, and family-owned businesses. He frequently works with faith-based organizations and their congregations.

Over his career, David has assisted small businesses with meeting requirements for bank loans through audit services and also has provided consulting services. He also understands the client's perspective and has worked as a controller for six years in the private sector.

EDUCATION & CAREER

David began his career at a big four firm, Ernst & Young, LLP, and officially became a CPA in Rhode Island in 1996. His experience spans nineteen years in public accounting as well as six years in the private sector, as the controller of a leading medical equipment manufacturer.

A life-long learner, he earned two B.S. degrees, one in social science and one in accounting from Evangel University and Rhode Island College, respectively, as well as an MBA in finance from Bryant University. He also completed coursework in the Master of Science in Taxation program at Bryant. He is a member of the American Institute of CPAs and the Rhode Island Society of CPAs. He also is a member of the Small Firms Committee of the Rhode Island Society of CPAs.

COMMUNITY

David remains committed to the community where he works and lives. With a deep faith as a Christian, David is active in a variety of capacities at his church. David has been a resident of Cumberland for almost three decades and is a graduate of Cumberland High School. He is also a member of the Woonsocket Rotary Club.

He previously was a board member for Extraordinary Child, a non-profit based in Cumberland that provided support for children and their families.

GET IN TOUCH

To learn more about how David can help you or your business, reach out to him directly at 401.335.5517.