



HUDSON
VALLEY
NONPROFIT
CONSULTANTS



CONNECT WITH EXPERTS

Name: David Sterman

Expertise: Financial Planning, Finance, Governance

Company Name: Huguenot Financial Planning

Position: Financial Advisor

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Social Profiles:

Email Address: David@HuguenotFinancialPlanning.com

Location: New Paltz, NY

ABOUT ME AND MY WORK

Typical projects, tasks or challenges you partner with nonprofits on?

I help finance committees and Executive Directors know the important components of budgeting, strategic planning, and general financial oversight.

Why would someone choose to work with you?

I have extensive experience as a Board Treasurer for a range of non-profit organizations and provide advisory services to non-profits of which I am not a board member.

I studied Philosophy and Political Science as an undergrad at Emory University. After obtaining a Master's Degree in the Science of Management (MSM) at Georgia Tech, I held various positions on Wall Street, including as an equities (stock) analyst, Director of Research and Chief Compliance Officer. After my career on Wall Street, I became a Certified Financial Planner™, helping clients as a fee-only financial planner. I am also very proud of a quarter century of financial journalism that has helped investors and consumers of all stripes.

Lastly, to round out a meaningful life, I work with a range of non-profit organizations, for example serving as the Board Treasurer of the Wallkill Valley Land Trust, the United Way of Ulster County and WINGSGuatemala, a Guatemala-based provider of reproductive health. My most rewarding efforts come in through volunteerism, working with groups such as the Restorative Justice and Community Empowerment Center of Ulster County and the Ulster Immigration Defense Network (UIDN).