

## Questionnaire for Nomination to the Tremont West Development Corporation Board of Directors

Name: Daniel Imfeld Phone: \_\_\_\_\_ Cell: 716-338-2119

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Email: daniel.j.imfeld@gmail.com\_\_\_\_\_

1. Please describe your involvement with the Tremont West Development Corporation or other Tremont clubs and activities during the last 5 years:
  - **Tremont West Development Corporation Board Member 2020 – 2023**
    - Tremont West Development Corporation Executive Committee (Treasurer) – 2021 – 2023
  - **Member of North of Literary Block Club (2021 – 2023)**
  - **Member of South of Jefferson Block Club (2015 – 2021)**
  - **Tremont Trek – Host Home 2019 and Planning Committee 2020**
  - **Active participant in Tremont (Taste of Tremont, Tremont Farmers Market, Walk About Tremont, Tremont Trek, etc.)**
  
2. Please describe any involvement that you have had with charitable organizations during the last 5 years:
  - **Tremont West Development Corporation – Board Member and Treasurer**
  - **St. Marin De Porres High School – Board Member and Finance Committee Chairman**
  - **United Way – Emerging Leaders Co-Chair**
  - **John Carroll University – guest speaker to Accounting and Finance classes**
  - **Pelotonia – cancer bike ride fund raiser and participant**
  
3. Please describe any other memberships on boards or committees that you have had during the last 5 years (such as non-profit organizations, professional associations or city or county government):
  - **St. Marin De Porres High School – Board Member and Finance Committee Chairman**
  - **United Way – Emerging Leaders Co-Chair**
  - **American Institute of Certified Public Accountants**
  - **Ohio Society of Certified Public Accountants**
  
4. Please describe the skills and areas of expertise that you would bring to the Board of Directors of the Tremont West Development Corporation.:
  - **Professional Skills:**
    - **Financial Advisor – Licenses; Series 7, Series 66**
    - **Certified Financial Planner <sup>TM</sup>**
    - **Certified Exit Planning Advisor**
    - **Certified Public Accountant**

- **Tremont Experience:**
  - **TWDC BOD member since 2020**
  - **TWDC Treasurer since 2021**
  - **Homeowner in Tremont since 2015**

5: Please state why you are interested in serving on the Board of Directors for the Tremont West Development Corporation:

- Tremont is my home, and I am passionate about the continued success and improvement of the neighborhood. This includes continuing to invest in residential homes, newbuild and rehab, attracting new restaurants and business, improving the parks, increasing safety and promoting the overall community we all live in. This also includes ensuring we maintain the diversity and culture that is already present in Tremont. We can do this through ensuring that we protect and help long time residents of the neighborhood remain vibrant pieces of our community. The neighborhood has matured over the last number of years, and I'd like to continue to help the community grow and remain a place where all people prefer to live, work and relax – both lifelong and new residents.

Over the years I've lived in Tremont, I've grown to love the neighborhood and want to be able to do my part to help contribute to the continued success of the neighborhood. I think that my professional experience coupled with my experience living in Tremont will allow me a unique opportunity to be a valuable asset to the Tremont West Development Board.

Membership on the TWDC Board of Directors requires a substantial commitment of time and energy. Members of the Board typically serve on one or more committees, which meet monthly, as well as the Board of Directors meeting, which also meets monthly. Typically, Board Members spend between 5 -10 hours per month on TWDC matters. Please indicate the number of hours per month that you will be available as a member of the Board of Directors: 10

**Please send this application, along with a current résumé and a short (not more than 75 words) statement that contains the information you most wish voters to consider to: [twdcboard@gmail.com](mailto:twdcboard@gmail.com)**

**75 Word Statement:**

Tremont is my home and I am passionate about the success and safety of the neighborhood we all love and live in. I aim to do my part in helping Tremont remain a place people come to live, work and relax and aim to help our current residents remain vibrant members of the community. My experience as the current Treasurer of the TWDC Board of Directors and my professional financial services work experience positions me as a unique and valuable asset to the board and neighborhood.

# Daniel J. Imfeld, CPA, CFP®, CEPA

daniel.j.imfeld@gmail.com

Cleveland, Ohio  
716-338-2119,

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## SUMMARY

Financial Advisor, Certified Public Accountant, Certified Financial Planner™ and Certified Exit Planning Advisor with extensive experience serving Cleveland's largest businesses as a CPA and wealthy individuals as a Financial Advisor. This includes building the foundation of new client relationships, developing and executing a new service approach and constructing cohesive teams to serve our clients.

## PROFESSIONAL EXPERIENCE

**UBS Financial Services** **Cleveland, OH**  
*Financial Advisor, First & Main Wealth Management Group* **November 2018 – Present**

- One of three partners who manage \$425M+ of assets for individuals providing:
  - Individual financial planning
  - Portfolio management and asset allocation
  - Market research and analysis
  - Retirement planning
  - Banking and lending solutions

**Deloitte & Touche LLP** **Cleveland, OH**  
*Manager, Audit & Assurance* **September 2013 – November 2018**

- Provided audit and assurance services related to the annual audit and interim reviews of financial statements and accounting procedures of clients
- Primarily served SEC registrants, auditing in accordance with the Auditing Standards set forth by the Public Company Accounting Oversight Board

***Lead Manager, \$3.5M audit account of a \$4B in revenue SEC Registrant***

- Managed and oversaw daily engagement activities for client including:
  - Providing client with the highest level of service, adapting to their changing needs
  - Delivering status updates and support to the Partner group
  - Supervising and mentoring ten junior staff members
  - Coordinated with internal Tax and Information Technology specialists
  - Integrated and coordinated with internal offshore resources
  - Executed our audit plan throughout the year to ensure completion of the audit
  - Oversaw, monitored and forecasted \$400K expense budget

***Support Manager, \$7.5M audit account of a \$5B in revenue SEC Registrant***

- Assisted in performing testing over significant risk audit areas
- Performed site visits for significant components

***National Managing Partner Advisory Council – Central Region*** **June 2016 – November 2018**

- Cleveland office liaison to council comprised of thirty offices
- Advised and provided feedback to the Central Region Managing Partner on topics including:
  - Market growth, client relationships, audit innovation and transformation, resource retention, performance management

***Management Advisory Committee – Cleveland*** **October 2013 – November 2018**

- Senior liaison for advisory committee representing ninety local audit professionals
- Coordinated and facilitated office wide town hall meetings
- Built employee engagement through firm sponsored events, hosting round table discussions and developing open lines of communication to firm management

***“Maximizing Your Professional Success” Leadership Program*** **April 2017 – November 2018**

- Participant in a cross functional leadership development program
- Program focused on effective and inclusive downward and upward leadership
- Year-long mentorship program with a local Partner

***United Way Campaign Leadership Committee*** **September 2017 – December 2017**

- Member of the leadership committee promoting the 2018 United Way campaign
- Achieved 100% participation within the Cleveland Audit practice

**COMMUNITY INVOLVEMENT AND PROFESSIONAL ASSOCIATIONS**

**Saint Martin de Porres High School**

***Board of Directors, Finance Committee Chairman*** **December 2018 – Present**

- Provide guidance and advice on financial position and budget of school

**Tremont West Development Corporation**

**May 2020 – Present**

***Board of Directors, Treasurer, Finance Committee Chairman***

- Provide financial oversight and planning for the community development organization

**United Way**

***Emerging Leaders, Executive Committee Chairman*** **December 2017 – July 2022**

- Provide strategic vision and lead the young professionals chapter
- Mentorship Program Chair
  - Coordinate and develop relationships between mentors and mentees

**American Institute of Certified Public Accountants**

**November 2014 – Present**

**Ohio Society of Certified Public Accountants**

**November 2014 – Present**

**EDUCATION AND CERTIFICATIONS**

**John Carroll University**

**September 2009 – May 2013**

Degree: Bachelor of Science in Business Administration

Majors: Accountancy and Finance

Honors: Valedictorian, Boler School of Business

**Certified Public Accountant**

**November 2014 – Present**

**Certified Financial Planner**

**April 2023 - Present**

**Certified Exit Planning Advisor**

**April 2020 - Present**