



**DAVID  
SCHLOSSBERG**

**KEY AREAS OF EXPERTISE**



Estate Planning



Taxation



Wealth Preservation



Business Succession



Charitable Planning

**MORE THAN PLANNING. A  
BRIGHTER TOMORROW  
TOGETHER.**

## Northeast Private Client Group Welcomes David Schlossberg to Expand Wealth Planning Services

Northeast Private Client Group is pleased to announce that David Schlossberg is now providing wealth planning services in collaboration with the firm. Bringing more than 44 years of experience in estate planning, taxation, and wealth preservation, David enhances the firm's ability to deliver comprehensive planning strategies for business owners, entrepreneurs, executives, and families.

Throughout his distinguished career at CSG Law, David served as Managing Member, Chief Financial Officer, and Chair of the Trusts & Estates Group. In these leadership roles, he advised clients on sophisticated estate planning, business succession, charitable planning, wealth preservation, and tax-efficient strategies designed to help protect and transfer wealth across generations.

David's career began in public accounting after earning his Bachelor of Arts and Master of Business Administration from Rutgers University. He started at Touche Ross (now Deloitte), became a Certified Public Accountant in New Jersey in 1980, and later earned a law degree from Seton Hall and a Master of Laws (LL.M.) in Taxation from New York University. His unique combination of legal, tax, and financial expertise allows him to provide thoughtful guidance tailored to each client's individual goals and circumstances. David will work with your attorney and accountant in creating an estate plan that works for you.

David's collaborative approach and client-first philosophy align closely with Northeast Private Client Group's commitment to helping clients build, preserve, and transfer wealth with confidence. By combining advanced planning strategies with personalized financial guidance, the firm continues to expand the resources available to clients seeking comprehensive wealth management solutions.



*"At Northeast Private Client Group, we believe the best outcomes from surrounding our clients with experienced professionals they know and trust. David's decades of experience make him an invaluable addition, and we're excited for the opportunity to work alongside him in helping our clients protect what matters most."*

— Mark B. Murphy, CEO and Founding Partner, Northeast Private Client Group

**CONTACT US**

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**ABOUT US**

Northeast Private Client Group is a distinguished boutique financial advisory firm, driven by a profound commitment to our guiding principles, which enable us to consistently deliver exceptional results.