

## David Borden ★

**PRINCIPAL**  
**CCR Wealth Management**

**Company location:** Westborough

**Residence:** Newton

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FORTY



### CAREER HIGHLIGHTS:

Since moving to Massachusetts in 2000, I have led CCR Wealth Management from a two-person startup to a full-service wealth advisory team. In addition, the firm's assets under management have grown from \$20 million to more than \$700 million. The firm continues to grow. One of my biggest accomplishments during this time is having an almost 100-percent client retention rate while continuing to grow the firm. It is a testament to the focus our team places on our clients.

### COMMUNITY INVOLVEMENT:

My wife and I consider it our responsibility to give back to the community, and now, as parents, it is even more important because we are setting the example for our daughter. We are proud supporters of the Museum of Fine Arts as current members of the Museum Council. Over the years, we have been involved in many worthy causes including Jewish Vocational Services, Combined Jewish Philanthropy, The Garden Arts Center, the American Cancer Society, Earth Day cleanups and The March of Dimes.

### BIGGEST SUCCESS:

Taking a start-up company and helping to build our firm into a complete team. We get great satisfaction in seeing our clients achieve financial and personal goals.

### BIGGEST CHALLENGE:

Professionally, helping our clients navigate the complex financial world in which we live is a constant challenge. Personally, finding the right work-life balance can be extraordinarily challenging, so it is essential that spending quality family time with my wife and our three-year-old daughter is always a priority.

### MENTORS:

I learned early on the importance of recognizing that you can find a mentor in any situation. At the start of my career, the boss who tossed a razor on my desk and "suggested" that I shave every day made an impression I will never forget.

### HIDDEN TALENT:

Growing up with a father who owned a shoe store, I can properly fit your child's shoes.

### FAVORITE MOVIE:

"The Hangover"

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