



Kathy Davis, CPA, AEP®

Manager

kathy.davis@saltmarshadvisors.com

Kathy is a Manager with experience across the tax and advisory services at Saltmarsh. With more than 10 years of experience serving high-net-worth individuals with a focus on estate, trust, and tax planning. Kathy brings deep expertise in helping clients navigate complex tax matters and implement strategies that support long-term financial and legacy goals.

Prior to joining Saltmarsh, she held leadership roles where she built extensive experience in estates and trusts, individual tax planning, and advisory services for closely held businesses and families. Known for a thoughtful, client-centered approach, Kathy is committed to delivering practical solutions that align financial planning with each client's broader objectives.

Education

B.S.B.A Accounting - University of West Florida

B.A. Psychology - Texas Tech University

Certifications

Accredited Estate Planner

Certified Public Accountant

Professional Affiliations

National Association of Estate Planners & Council North West Florida Chapter

Leadership Pensacola (LeaP) - Class of 2020



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(800) 477-7458