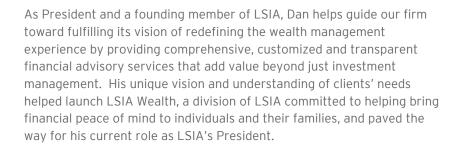




Owner & President

Started in the Investment Industry: 2004

Joined LSIA: 2008



In addition to overseeing the execution of the firm's strategic, operational and business development initiatives nationwide, Dan provides comprehensive financial planning to individuals and families with the goal of building and protecting their wealth. He works to ensure all financial aspects of his clients' lives are well cared for, acting as their personal Chief Financial Officer, offering guidance on a variety of financial matters, including investment management, retirement income, risk management, tax planning, insurance, and multi-generational wealth and estate planning, among others.

Dan is a knowledgeable and strong presence within the financial community. Before reaching age 30, he attained the Chartered Financial Analyst® designation and the CERTIFIED FINANCIAL PLANNER $^{\text{TM}}$  certification.

Dan's passion for serving others and improving peoples' lives extends beyond his professional life. In his spare time, he is an active volunteer with Woodside Bible Church and the Dream Centers of Michigan, where he provides financial and career guidance to help individuals and families. Dan also enjoys landscaping, ice hockey, working out and spending time with his wife Christen and their family.



CFA Detroit - Board Member
CFA Institute - Former Board Member
Financial Planning Association - Member

## **WORK EXPERIENCE**

Portfolio Management Partners - Portfolio Manager StraightLine Advisors - Research Analyst Plante Moran Financial Advisors - Financial Planner

## **EDUCATION AND ACCREDITATIONS**

Michigan State University - Bachelor of Arts Chartered Financial Analyst® CERTIFIED FINANCIAL PLANNER™ professional

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