



Daniel Kostaroff, CFA, CFP®

Owner & President

**Started in the
Investment Industry: 2004**

Joined LSIA: 2008

As President and a founding member of LSIA, Dan helps guide our firm toward fulfilling its vision of redefining the wealth management experience by providing comprehensive, customized and transparent financial advisory services that add value beyond just investment management. His unique vision and understanding of clients' needs helped launch LSIA Wealth, a division of LSIA committed to helping bring financial peace of mind to individuals and their families, and paved the way for his current role as LSIA's President.

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™ 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.

PROFESSIONAL AFFILIATIONS

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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