

FRANK DANIELSON

Primary Role

I act as a Personal CFO and wealth mentor for a select number of high net worth individuals and families.

Fast Facts

- ◆ Senior Financial Planner
- ◆ B.Ed. (Biology), CFP (1994)
- ◆ Clientele: Business Owners, CEOs, Senior Executives, Incorporated Medical Professionals
- ◆ Creator of Family Wealth Portal
- ◆ Financial literacy and creating good inheritors advocate
- ◆ Managing Partner: Danielson Group Wealth Management
- ◆ Primary Wealth Mentor: 30 Families

Service Summary

- ◆ Overall wealth planning experience
- ◆ Philanthropy and planned giving
- ◆ Overall portfolio design and construction
- ◆ Wealth 360
- ◆ Tax, estate, will planning
- ◆ Business exit planning
- ◆ Strategic wealth planning
- ◆ Risk management

Financial DNA: Reflective Thinker

Reflective Thinkers are analytical, logical, and philosophical in their search for meaning, truth and purpose in all they do. They are particularly adept at drawing incisive conclusions from data and research. Their accuracy and precision is valuable in any finance or advisory setting, and they bring objectivity to decision-making processes.



By collaborating to manage our client's sophisticated and complex needs, we help bring better balance to their lives.

Through our commitment to comprehensive planning, financial literacy, and passion for personal service we help ensure our clients' **peace of mind** and life long financial success"

Biology studies taught Frank the importance of scientific thinking. By combining his evidence based approach to investing with a clear understanding of each families' unique financial DNA, he and his team are able to create the most optimal financial plan for your family.

His creative, innovative approach drives him to assist you in maximizing your current resources and financial potential.

In addition to golfing, family time and photography, Frank is also a strong supporter of youth outreach programs that support struggling young people in realizing their dreams.