MICHIGAN FINANCIAL COMPANIES

ROCHESTER WEALTH MANAGEMENT

Dan Gardner is a Financial Planner with Michigan Financial Companies-Rochester Wealth Management. Dan has built his practice around putting his clients' interest first. To help each of his clients achieve their unique goals, he follows a specific three-step process:

1. Planning

Dan begins by helping his clients determine exactly how much money they will need to be financially secure throughout every stage in life, including a long retirement.

2. Provide Perspective & Educate

Throughout their relationship, Dan aims to provide perspective during important economic events. By keeping his clients informed, their portfolios are designed to withstand changes in the market.

3. Managing Investment Behavior

Working with a trusted advisor helps keep emotions out of investing. Dan provides guidance to his clients so they can better manage their instinctive reactions to market volatility.

As a speaker for the Office of Planned Giving, Dan provides financial education for Oakland University faculty and staff.

Education

- Oakland University, 1995 - Bachelors Degree in Business

Professional Registrations & Designations

- CERTIFIED FINANCIAL PLANNER™ (CFP®), 2000
- Chartered Financial Consultant (ChFC), 2004
- Named Five Star Wealth Manager, 2008-2016 by *Hour Magazine**

Memberships & Affiliations

- Certified Financial Planner Board of Standards
- NAIFA
- The Financial Planning Association
- Oakland University Alumni Association

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Personal Data

Dan currently resides in Rochester Hills with his wife, Amy, and their three children Kate, Drew and Aubrey