



## DANIEL ADVISORS

### YOUR *Personal* CFO

#### **Vision**

*To help our clients live out their passions. We believe that our Personal CFO relationship and disciplined process for decision-making will help our clients live a rich and meaningful life.*

#### **Mission Statement**

*To help our clients define and achieve their life aspirations.*

#### **Core Values**

*We believe in lifelong relationships.*

*We believe in wealth that cannot be measured in dollars.*

*We believe that strategic advisors are personal advisors.*

***Exude Trust – Strive for Perfection – Refuse Compromise***

## Core Beliefs

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After years of experience working with many individuals and families, we have learned that even clients with “financial plans” often fail to achieve their life goals. This has taught us that clients need more than a plan; they need a dedicated relationship and a disciplined process for financial decision-making.

In order to meet our client’s needs, we have developed a proprietary decision-making process we affectionately call **D<sup>5</sup>**. This is more than a “5 step program”. Our process has an exponential effect...it is **D** to the 5<sup>th</sup> power!

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### Dedicated Relationship

*Our advisors are competent AND caring.  
Our advisors understand that life is personal.  
Our advisors don’t see you as an account number.  
Our advisors make mistakes and accept responsibility.*

### Disciplined Process

- D<sup>1</sup>** – Discover YOUR past...“What past experiences define you?”
- D<sup>2</sup>** – Define YOUR future...“Who do you want to be?”
- D<sup>3</sup>** – Detail YOUR present...“Where are you today?”
- D<sup>4</sup>** – Design YOUR strategic plan...“How do you get there?”
- D<sup>5</sup>** – Discipline YOUR financial life...“Get started today!”

***D<sup>5</sup> – 5 Decisions to achieve YOUR Life Aspirations***