

As Seen In... *Forbes*, July 26, 2016

# Comprehensive. Holistic. Tactical.

## Danielson Financial Group

Spend a few minutes with Deborah L. Danielson, CFP®, CFS®, MSFS, and you'll feel like you've known her forever. But behind her engaging manner and friendly smile lies one of the sharpest minds in the financial services industry.

For 35 years, Danielson has been helping high-net-worth clients manage their investments and pursue a wide array of financial goals. Danielson is president and owner of Danielson Financial Group, a full-service wealth management firm offering simple investment management to complex investment strategies, as well as education fund (529), retirement, tax and estate planning. The firm provides securities and financial planning through an independent broker-dealer, with the ability to offer any stock, bond or mutual fund on the same platform. It does not offer any proprietary products, and its services are predominantly fee based.



Deborah L. Danielson

### HONORS AND ACCOLADES

Deborah L. Danielson has been recognized by *Barron's* for eight consecutive years. The magazine ranked her among the Top 1200 Financial Advisors in America 2009-2016, and The Top 100 Women Financial Advisors in America 2008-2014 and 2016. The Top 100 Women Financial Advisors is based on assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work.

Closer to home, Danielson was chosen to represent the financial services industry as a recipient of The Distinguished Women in Nevada 2014 Endeavor Award.



Danielson says the firm is happy to provide guidance on any matter that affects a client's finances, from insurance to mortgages to car leases. Sometimes, she says, it's a matter of keeping clients "on task" and tactfully dissuading them from making choices that may interfere with reaching their goals. Each client is assigned a relationship manager dedicated to providing the highest level of "Ritz Carlton" service.

Whenever possible, the team works with both members of a couple. "I think that's really important, because many times men still handle the finances and the wives don't really know what you've done for their family," Danielson says. "That can be a big mistake."

Danielson believes that in today's environment, "people need to be a bit more tactical with their investments. I don't think you can just 'set it and forget it' and hope everything will be better." Depending on the client's needs and risk tolerance, she may recommend alternative investments that don't

necessarily correlate with the markets, along with more traditional stocks, bonds and mutual funds.

"We get to know the whole person," Danielson says, "their challenges, their opportunities. What are they passionate about? What's keeping them up at night? What's most important to them? Then, whether their top priority is philanthropy or putting their children or grandchildren through college or owning a second home, we work for them and with them to help them develop their goals."

### Special Support for Women in Transition

Women who are newly widowed or divorced face unique financial challenges. Fortunately, they don't have to face these challenges alone. They have a friend – several friends, in fact – at Danielson Financial Group. Deborah L. Danielson and her compassionate, well-trained team have a special affinity for women in transition due to death or divorce. "We're here for them," Danielson says.

"In addition to being very vulnerable emotionally, women who find themselves single after years of marriage are often inclined to make rash decisions about their money – or their lives. We encourage them to wait and think things through before doing anything major, such as selling their home or moving to another part of the country. We try to help them avoid doing anything they may later regret."

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