



Dan Finkel

Registered Representative

Dan Finkel has been a member of Savage & Associates since 1999. He helps people build wealth by assisting with retirement savings. He helps protect that wealth with life, health and disability insurance. Then in retirement, he helps people manage their investments and distributions to make sure those assets provide a steady income as long as possible.

Education

Dan graduated from Miami University with a bachelor of science in business. He has a Series 7 securities registration. Dan received his LUTCF[®] designation from the American College and the National Associate of Insurance and Financial Advisors in 2006. He received his Certified Financial Planner (CFP[®]) designation in 2009. Dan also received the designation of Chartered Financial Consultant (ChFC[®]) in 2012

Personal

When Dan is not working, he enjoys Aikido and riding his Kawasaki ZRX1100 (yes, with a helmet). In the summer he tries to put a few hundred miles on his bicycle and often rides in the MS Bike to the Bay event in June to raise money to fight Multiple Sclerosis. He is the technical director for the drama program at Ottawa Hills High School and lives in the historic Old West End of Toledo. Dan can be seen in the office wearing a freestyle bow tie and will tell you that if you can tie your own shoes you can tie a bow tie with little practice.

Registrations:

Securities Registered in CA, CO, FL, IN, MI, NM, OH
Registration Series 7 and 63

Contact:

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Designations:

AIF[®] Accredited Investment Fiduciary
LUTCF[®] (Life Underwriter Training Council Fellow)
CFP[®] (Certified Financial Planner)

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