



Dan McDonald CFP®, CLU®, ChFC®
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Dan leads the RIA Insurance Solutions division at Financial Independence Group. RIA Insurance Solutions is focused on helping financial advisors to incorporate insurance into their business models to create secure financial outcomes for clients. Dan works with advisory firms, insurance carriers, and fintech partners to streamline insurance processes for fiduciaries. Dan's approach is to educate clients and advisors on the benefits of insurance in a comprehensive financial plan, and then make it easy to implement the right insurance solutions for the client.

Prior to joining RIA Insurance Solutions, Dan was an executive at a large insurance carrier where he primarily worked in distribution and strategy roles. He was responsible for distributing life and annuity products through multiple channels including advisory firms, broker dealers, and insurance agents. Dan recognized the industry trend towards independent advisory distribution and identified a need for RIAs to have an experienced and objective partner for insurance, regardless of their business model. He joined RIA Insurance Solutions to make the insurance process simple for financial advisors that want to protect their clients.

Dan graduated from Boston College with a double major in Finance and Economics. He holds the Series 7 and 24 securities licenses and is insurance licensed. Dan has earned the CFP®, CLU, and ChFC designations.

Link to Dan's background on FINRA Broker Check -
<https://brokercheck.finra.org/individual/summary/5828878>

Securities offered through American Global Wealth Management Member FINRA, SIPC, MSRB