

# Financial Wellness...



# ...Through Sound Instruction

**DANIEL C. FLANSCHA**, CFP®, CLU®, ChFC® has been in financial services for over 30 years. He started in the industry following graduation from Iowa State University where he received a Bachelor of Science degree to teach. Across the country he has served people with personal financial planning, retirement, business and estate planning. He worked with a Fortune 500 company for 21 years serving

in a variety of roles including a position among the top 100 leaders. Throughout his career, Dan has been a part of the planning process for thousands of families.

Dan is passionate about teaching, mentoring, and educating people about the behavior of money. He feels strongly about a holistic financial approach versus trying to convince someone that one product will solve all their financial needs. He very much believes in doing what is in the client's best interests.

Today Dan is one of roughly 5,000 practitioners across the U.S. who utilize a macro-economic process to help individuals organize, coordinate and shape personal finances. He does this through his own business - Longs Peak Financial.

Dan serves as adjunct professor for CPE4U Colorado (formerly part of the University of Denver), a private business which provides continuing education to CPAs, attorneys, and financial advisors. He teaches classes on retirement income planning, Social Security, tax strategies, macro-economic principles, business strategies and insurance.

Dan holds Certified Financial Planner® (CFP), Chartered Financial Consultant® (ChFC) and Chartered Life Underwriter® (CLU) designations. He is life and health insurance licensed along with securities licenses: FINRA Series 6, 7, 63, 66, 24 and 26. He works with investments as an Investment Advisor Representative.

# Who's Dan?...

Dan and his wife, Janelle, live west of Berthoud. They have been married for over 30 years. Janelle, a Colorado native, teaches in two home school enrichment programs and is music director at their church.

They have four boys: Jesse, Lucas, Stephen and Benjamin. Jesse is a mechanical engineer. Lucas is married and is an army infantry officer. Stephen owns a photography business called Differential Imagery which specializes in automotive photography. Benjamin is in the Wyoming National guard and is in college.

Dan grew up in the Midwest and has always had an interest in agriculture. In high school he was active in FFA (Future Farmers of America) and is a State Farmer Award recipient. This led to a Bachelor of Science degree from Iowa State University in Agriculture Education. Immediately following graduation, Dan spent a summer in Alaska fishing commercially and working on the Point McKinsey Dairy Project.

After returning to Iowa, he entered the financial services industry where he has remained ever since. In 2006, the family elected to move back to Colorado where Dan wanted to start his own business.

Dan enjoys working with his hands, doing woodworking, metal work, automotive work and construction. He also enjoys snow skiing, motorcycling and family activities. He has also, in one way or another, always been active in leadership in their church.

Virtually every day Dan spends some time reading a book, an article, or research material which covers a topic in the financial industry. He does this to stay current, to understand what is developing, and to determine how he can use what he learns to assist the people he has been entrusted to serve either through advice or his teaching responsibilities. Every year Dan also participates in more formal educational opportunities through a variety of sources in order to glean different perspectives. In some cases this is to stay current with the professional designations and licenses he holds, and in other cases it applies to additional industry qualifications.

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