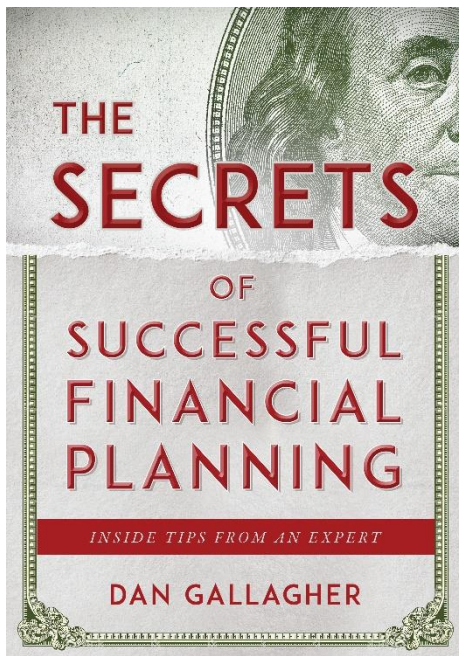


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Take charge of your financial future with little-known advice from a nationally recognized expert.

THE SECRETS OF SUCCESSFUL FINANCIAL PLANNING

Inside Tips from an Expert
By Dan Gallagher



There are six interrelated areas of financial planning: Cash & Budget Planning, Insurance & Risk Management, Tax Management, Retirement Planning, Investment Planning, and Estate Planning. What aspects of the financial plan require sophisticated planning by a professional, and what can savvy, well-educated consumers handle themselves? This book touts several unique and rare reader benefits:

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very few. For example, consumers buy more long-term care insurance than they need because their advisors are forbidden to show them alternative or supplemental strategies. They buy one large life policy when best practice analysis usually would find need for two smaller, distinctive types. They get recommendations for annuity, insurance, and investment replacement, but how can they be certain the answers they get are

unbiased? Author Dan Gallagher provides advice and counsel that will help readers set the stage for financial security for themselves and their families. He shares what you can do yourself and when you need a pro's help.

About the Author:

Dan Gallagher has been an award-winning, nationally recognized financial planner for over thirty years. Retiring in December 2017, he discontinued designations (Certified Financial Planner, Chartered Life Underwriter & Chartered Financial Consultant, and Certified Business Intermediary) and licenses & registrations (several in securities, insurance and investment advisory fields, and realty-related fields: commercial realty, Broker-in-Charge, business valuation & brokerage, and licensed/published instructor). He has never had a consumer complaint in any licensed field. Although Dan no longer serves clients, he stays current in these disciplines. So, Dan's advice in this authoritative book is without bias or practice-supporting agenda. He has provided countless seminars and been extensively published in these fields for professionals and the general public. He became an Army Infantry officer after graduating from Virginia Military Institute with a BA in Economics and simultaneously completing requirements for the Modern Language curriculum. He earned his MBA at William & Mary and, years later at University of North Carolina, a graduate English teaching certificate. Dan is a family man, devoting the last thirty years to wife Laura and their four children. Dan's hobbies include wood art, the outdoors, private charities, and writing fiction, humor, and narrative nonfiction. He offers expert witness engagements (inquiries accepted only through The Expert Institute, NY), keynote speaking & financial training, and lives in Charlotte, NC. More detailed bio and writing samples: AuthorDan.com Book orders: SkyhorsePublishing.com

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