

How Author / Freelance Writer and Speaker/Trainer Dan Gallagher can Help You

Are your internal or external facing materials unclear, verbose or plagued with errors? This hurts productivity and revenue. Get a decades-experienced, nationally recognized, royalty-published expert (see video bio). He is a financial planning expert writer and speaker with very broad-based experience from troop leadership and family life to business brokerage and world travel. Now retired, Dan has no financial client acquisition agenda or bias: Trust him to write **effective persuasive materials** and **advantage your people, their skills and client relationships**. You're warmly invited to read this summary, then visit AuthorDan.com (Freelance section) for more. Dan Gallagher can **propel your competencies, relationships and revenues** by:



- creating written materials: Dan can write emotion-packed, riveting and clear corporate stories, internal & client-facing narratives, as well as training and compliance pieces (or team with your staff to create these). Testimonials and work samples are at the site.
- speaking at client appreciation events & seminars: Both Dan's book (not self-published) and his speaking can function as a *powerful* closing direct-assist. Dan explains and effectively endorses wise strategies at which clients would otherwise balk. Dan is newly retired and, so, has no bias and no client acquisition agenda.
- motivating and entertaining attendees at your financial or legal convention: Dan's topics, as the title of his latest book infers, are crucial yet poorly understood – even secreted – financial and legal issues. His true client stories can tug heartstrings.
- training for financial and accounting representatives & consultants: Dan hones your people's relationship selling skills, sharing insightful ways to integrate advanced technical knowledge with genuine demonstrations of caring about clients and prospects.

Who Derives the Most from Dan's Work?

Dan's speaking and training would most benefit financial firms, especially planning, accounting, securities & insurance brokerages and financial product manufacturers. Many clubs and special interest groups, such as retiree and veterans groups, etc., would be entertained and gain valuable insights. Any firm, but especially financial entities, would benefit from Dan's ability to write corporate and family stories and promotional or internal documents. Some individual writers needing content editing, rather than mere proofreading, would benefit, too.

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Speaking and Writing Experience:

Dan gave hundreds of presentations while in active financial planning (1990s through 2017) and business brokerage (2001 through 2007). These included the Charlotte Chamber of Commerce's 2007 “Business Disposition Workshop” and employee financial planning support at Delta Environmental Consultants (now Antea Group), Anheuser-Busch, Norfolk Naval Shipyard, Canon USA, as well as seminars and licensing courses for his own practice.

Dan’s book, *The Secrets of Successful Financial Planning* (Skyhorse Publishing, NY, Sep 2018) has strong reviews, including a glowing endorsement from Dr. Arthur B. Laffer, PhD., father of supply-side economics, author and advisor to two presidents. This is the only such book to ever have thirty dramatic tales of client tragedy and triumph, a fifth of its text, *rather than boring case studies*. In 2015 Dan completed the University of North Carolina Graduate Teaching program, including English background requirements equivalent to a B.A. in English. Articles by and about Dan have been published by *Virginia Lawyers Weekly*, *Financial & Estate Planning* and *Charlotte Ventures*. Dan’s narrative nonfiction and fiction and have been published by Skyhorse Publishing, Superversive Press, Millhaven Press, *Creative Loafing*, and *NFAA Archery*. Dan’s 1998 novel, *The Pleistocene Redemption* is revised and available soon as *Ancient of Genes*.

Professional and Service Experience:

Dan’s financial practice encompassed group and individual benefits, money management, financial plans, business valuation and brokerage, commercial realty, and—often very personal—counseling. Dan is among the very few who have attained nationally recognized competence in financial planning & brokerage *as well as* business disposition. Dan completed the Virginia Military Institute's Economics and Modern Languages curricula. As an Airborne Ranger, Dan commanded soldiers and served in Special Forces & Army Research Institute assignments. Dan completed his MBA at William & Mary and earned these professional designations: Chartered Life Underwriter and Chartered Financial Consultant, and Certified Financial Planner[®], and Certified Business Intermediary.

Dan’s is an expert source for Help A Reporter Out (HARO). Clients include GLG Consulting, AudienceHarvest.com, Financial Independence group, and more. Dan was accepted and registered in June 2018 as an “expert witness” with The Expert Institute, New York, and occasionally consults for GLG Consulting. Though he stays current, Dan is no longer a licensed competitor to financial brokerages or advisors, so you can trust him around your advisors and clients. Book Dan for your writing project or event *now!*

Call 704-362-1001