PLAN

PROFESSIONAL LIFE ADVISORS NETWORK


Dan R. Mythen
CEP®

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Dan Mythen is a specialist in the implementation and design of advanced planning strategies for families of significant wealth, entrepreneurs and professionals. For most of these clients this involves working with their advisors to establish, fund and leverage multi-generational wealth strategies, frequently in tandem with philanthropic techniques.

Dan has been in the financial services business since 1984. Dan has focused his efforts towards a specialization in estate, wealth, charitable, business succession and executive compensation planning for ultra-high net worth families, business owners and senior executives with estates ranging between $7 million and $2 billion.

Dan started his career working with investment management firms wholesaling their expertise to financial advisors throughout the west. In the late nineties he made the decision to become a valued resource in the planning areas listed above. He gained experience by working with a national wirehouse and insurance wealth management companies helping advisors realize the importance and opportunities in helping their clients in this area of advanced planning. Dan's primary goal continues to be the enhancement of the client / advisor relationship. Dan has a FINRA Series 7, 26, 63.

## EDUCATION

- University of California at Davis, Davis, CA
  BS, Managerial Marketing and Communications