

# DANIELS+TANSEY

SERVICES

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Ensemble wealth management  
for your financial harmony

# There's a lot to manage in today's financial landscape. We're here to help.

Our experienced team of multi-disciplinary professionals has 30+ years of experience delivering integrated wealth solutions with genuine, personalized service.



## Financial Advisory

A comprehensive plan serves as a blueprint for financial decision-making, so it makes a great place to focus at the start of a new client relationship.

Additional advisory services include family office administration and matrimonial support.

### Our Clients

We work with individuals, families and small businesses through all phases of the wealth lifecycle – accumulation, preservation and generational transfer. The services we offer are as diverse

### Our Team

Our multi-disciplinary team includes credentialed industry leaders, many of us with 30+ years of experience – but we're much more than that.

### Resources

Financial professionals have a habit of using industry jargon and technical terms. We want our clients to understand our findings and recommendations,

as our clients. From basic planning to full-suite family office, we tailor our engagements to meet your specific needs.

Our unmatched and unwavering client commitment is what really sets us apart.

so we strive to present information in a clear and concise manner.

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## In the News

12th ranked fee-only wealth management firm in 2015 . . . [read more \(http://www.cnbc.com/2015/06/03/cnbc-charts-the-top-100-firms.html\)](http://www.cnbc.com/2015/06/03/cnbc-charts-the-top-100-firms.html)

- CNBC

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