



Meet

Dan McHugh

Specializations:

- Retirement Planning
- Tax Planning
- College Planning
- Estate Planning
- Investment Portfolio and 401(k) Advice & Monitoring
- Social Security
- Medicare
- Insurance & Risk Management

Qualifications:

- CFP® (CERTIFIED FINANCIAL PLANNER™)
- Licensed CPA (Certified Public Accountant) in the state of Michigan
- BBA in Accounting and Personal Financial Planning, Western Michigan University

Honors:

- "America's Top Next Generation Wealth Adviser" 2018 (*Forbes*)
- Member of Oakland County's 2019 Elite 40 Under 40



Go to acadviser.com to learn more about Smartvestor Pros.

Daniel D. McHugh, CFP®, CPA

Dan is dedicated to understanding the available solutions to all of life's financial challenges. Hence, the impressive string of letters after his name. He is a licensed Certified Public Accountant as well as a CERTIFIED FINANCIAL PLANNER™.

As a financial adviser, Dan creates and implements comprehensive financial plans for families and individuals that are tailored to their specific needs and goals. This includes everything from providing Social Security and tax guidance to overseeing investment accounts and 401(k)s.

Prior to joining Advance Capital in 2010, he was a senior staff accountant at UHY LLP. He is a graduate of Western Michigan University, where he earned a BBA in both Personal Financial Planning and Accountancy. His memberships include the American Institute of Certified Public Accountants and the Financial Planning Association, and he serves on the Finance Council at St. Anastasia.

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Dan McHugh (continued)

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How do you explain your role to people who are not in the industry?

I simply say that I help people to successfully manage their life savings, usually with the goal of a comfortable retirement. I give people advice that can help them meet their financial needs as well as guide them through their financial challenges.

How would you describe Advance Capital's culture?

Our culture is both independent and supportive, making it very client-centric. We are encouraged to invest as much time as needed with clients and potential clients, regardless of account size. Meanwhile, everyone at Advance Capital is willing to collaborate to ensure that no client need goes unmet. It's the opposite of many firms in the industry.

How does Advance Capital's culture and resources contribute to your work?

The independent culture allows me to build long-term relationships with people. I'm not focused on closing deals but rather providing the professional, unbiased advice a client needs. And with a dedicated investment team and a full line of technology, I can conveniently provide insightful data and resources to help clients make prudent financial decisions.

What do you find most rewarding about your work?

I love my job because I get to help people. Each day is different, with new experiences and new opportunities to assist clients in planning their futures. My work isn't just about money; it's about solving problems so that someone can have the best chance to live how they choose. That's why Advance Capital is my career destination, not just a stop on my career journey.

What is your favorite piece of advice?

Knowledge is power, so know what you're getting for your money. This is huge for retirement. Understanding explicitly what you pay in fees and what level of performance and service you get in return gives you the most power to control your financial future.

Investment advisory services are provided by Advance Capital Management, Inc.

Investments are not insured, and may lose money. Client should be prepared to bear the risks associated with investing.

Fun Fact!

Dan is an avid pickleball player who plays competitively and has won numerous tournaments. You can find him playing on courts throughout metro Detroit – and he's always up for a game!