



Meet
**Sean
McDonnell**

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™)
- BA in Communications from Michigan State University

Sean K. McDonnell, CFP®

Sean builds strong relationships with families and individuals in order to better meet their financial needs. As a financial adviser, he works closely with his clients to create and implement an appropriate financial plan. He provides a wide range of services, including investment portfolio and 401(k) advice as well as retirement and tax planning.

Before joining Advance Capital, Sean worked as a successful small-business entrepreneur for more than a decade. In addition to earning a BA in Communications from Michigan State University, he has earned the CERTIFIED FINANCIAL PLANNER™ designation. He also serves as president of the St. Anastasia Finance Council in Troy, MI.

(Continued on back.)



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Sean McDonnell (continued)

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What influenced your decision to join Advance Capital?

I was very attracted to the firm's sincere commitment to serving individual investors. I have the freedom to spend my day working on my clients' needs rather than trying to sell them financial products. It gives me gratification knowing that those we help are better off.

How would you describe Advance Capital's culture?

It's a culture heavily focused on the education, planning and execution of anything related to the financial goals of each client. We are free to build relationships rather than work under pressure to jump on supposed hot investments or products.

Describe the importance of client education in your process.

The more clients understand their finances, how the industry works, how their portfolios work and how Advance Capital is different, the more successful their financial plans and their relationships with us can be. The more time I spend with a client listening to their needs and educating them, the better off we both are likely to be.

Where do good solutions come from?

The solutions we provide to our clients will always be a product of our attitude, character and competence. If these aspects are all positive, so likely will be the client's results.

What do you think is important about giving back to your community – both at the firm and for you personally?

I believe giving back is important for improving the character of our community as well as our own character. It starts with how we choose to treat the least fortunate. If we cannot help those people, as a firm or as individuals, then we are missing our responsibilities here as advisers and neighbors.

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!

Sean is a highly skilled, self-taught ballroom dancer. He even hosts a biannual big band event in Detroit.