



Meet

# Daniel Amiot

## Specializations:

- Retirement Planning
- Tax Planning
- College Planning
- Estate Planning
- Investment Portfolio and 401k Advice & Monitoring
- Social Security
- Medicare
- Insurance & Risk Management
- ERISA Fiduciary Advice (3(21) and 3(38))
- Retirement Plan Participant Education and Advice

## Qualifications:

- CFP® (CERTIFIED FINANCIAL PLANNER™)
- AIFA® (Accredited Investment Fiduciary Analyst®)
- BBA in Finance from Cleveland State University

## Daniel M. Amiot II, CFP®, AIFA®

As a financial adviser, Daniel coaches families and business owners in taking that next step to advance their financial lives. He is passionate about making a difference, whether that is helping a family who needs to get their financial house in order, or an entrepreneur who wants to upgrade the company retirement plan. Daniel has taken a particular interest in assisting Federal employees navigate the complexities of the FERS, TSP, and other government benefits.

Daniel has been serving clients in finance since 2007. He graduated from Cleveland State University with a Bachelor's of Business Administration in Finance and is a member of the Beta Gamma Sigma business honor society.

### How does ACM's culture and resources contribute to your work?

Our client-first fiduciary attitude, constant drive to provide better planning and client results, and branch office structure creates a small-business "feel," but with the resources of a much larger company. These resources have allowed us to build a service platform that combines

*(Continued on back.)*

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CAPITAL MANAGEMENT

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# Daniel Amiot (continued)

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advanced technology with the personal touch of a financial adviser, which puts me in a great position to serve my clients well and in their best interest.

## What do you find most rewarding about your work?

Experiencing the emotions of my clients when a plan comes together over time, as anxiety turns into security and worry turns into relief, is most rewarding. They have traded so much -- their time, energy, blood, sweat, and tears -- for their hard-earned money, and the knowledge that I helped them use this money to transform a successful career into an awesome life is extremely fulfilling.

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

Giving through the firm is important as our pooled resources can make a greater impact for a charity than we could individually. Personally, my wife and I spend a lot of time volunteering with youth, not just to teach leadership and values to boys and girls, but to serve as examples of what they can do to help others when they become adults. When it comes to impacting the life of a child, I find that nothing is more effective than simply sharing your time with them.

## What does it take to be successful in your role?

True success for advisers is not measured in product sales but in making clients successful. This takes financial expertise without conflicts of interest. We choose to be paid directly by our clients, not through commissions from investment companies. This choice aligns our interests with those of the people we help. We are then able to focus our knowledge, passion and attention to where it really matters – creating financially sound and sustainable futures.

## What makes your client experience unique?

I bring passion and enthusiasm to the care I provide to my clients. They have entrusted me and my firm with a portion of their lives, their futures and their business. This is not something that I treat lightly or systematically, but rather with personal attention and empathy to each individual situation.

*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!

Daniel, his wife, Jodie, and their four kids are heavily involved in the Boy Scouts of America. As a couple, Dan and Jodie volunteer their time in active roles leading scouting units and training adult leader volunteers.