



Dan Mythen

CEP

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Dan has been in the financial services industry since 1984, starting in equity and alternative investment wholesaling. In the mid 1990's, Dan shifted his focus to protection and tax efficient product solutions. He held a position for a major wirehouse where he headed up Insurance and Annuity business for 11 western states.

He works with wealthy and ultra-wealthy clients with estates of \$5 million to over \$1 billion. Dan helps design and implement strategic planning ideas for Business owners, Entrepreneurs, Senior Executives, Charitable Foundations and Global Citizens. He is known for excellent collaboration with the clients Investment, Accounting and Legal resources to achieve the best possible plan.

Dan earned his CEP designation and holds a Bachelor of Science degree from the University of California at Davis. He maintains FINRA series 7, 26 and 63 licenses.

Dan and his wife reside in Woodinville, Washington.

EDUCATION

- University of California Davis
Bachelor of Science in Management and Marketing