



# DANIEL J. CHAMPAGNE

CFP®, ChFC®, CLU®, CASL®, LUTCF®

Financial Advisor | Financial Services Representative  
Investment Advisor Representative

In today's complex world, it is more important than ever to have a financial services representative that can help you see the "big picture" and address your entire financial life. Together we will create a financial strategy that addresses both your near-term realities and your long-term challenges and goals. Areas of focus include retirement strategies, insurance protection, investment management, education funding, and estate conservation strategies. Throughout our relationship, I will provide the service and support you need to have confidence in the steps you have taken to achieve the financial future you want.

In addition, I give you the knowledge and information you need to make informed financial decisions with confidence and serve as your advocate, working with your other trusted advisors to bring the pieces of your financial life together. ~ Dan

## BARNUM

FINANCIAL GROUP



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### QUALIFICATIONS

- ◆ 8 Years in the Financial Services Industry, all at Barnum Financial Group
- ◆ Obtained the CERTIFIED FINANCIAL PLANNER™(CFP®) designation from the Certified Financial Planner Board of Standards, Inc.
- ◆ Obtained the Chartered Financial Consultant® (ChFC®), Chartered Advisor for Senior Living® (CASL®), Life Underwriting Training Council FellowSM (LUTCF®), and Chartered Life Underwriter® (CLU®) designations from The American College
- ◆ Holds his Series 7, 63 and 65 Securities licenses
- ◆ Licensed to sell Life, Accident and Health Insurance\* as well as Property and Casualty Insurance\*\*

### PROFILE

- ◆ Earned his Bachelor of Science degree from the University of Connecticut in 2009
- ◆ In his spare time, Dan enjoys a very active lifestyle. He enjoys competing in local Ninja Warrior competitions, hiking, kayaking, rock climbing, camping in our National Parks, snowboarding, and playing bass guitar
- ◆ Daniel was married in September 2014, and he and his wife Tina, reside in West Haven, Connecticut

### ABOUT BARNUM FINANCIAL GROUP

We empower you to be in control of your financial future. We are passionate about using our knowledge and experience to help our clients achieve both their short-term objectives and long-term goals.

With offices in Connecticut, Massachusetts, New Jersey, New York, and Rhode Island, we provide a full range of investment and risk management products and services to individuals and their families as well as small businesses, corporations, partnerships, government entities, and not-for-profit organizations and their employees in all fifty states.

We strive to build long-term relationships with each client through carefully understanding, thoughtful advice, quality service, professional integrity and financial education.

### TEAM OF RESOURCES



**Jeremy Hus**  
CFP®, ChFC®, CASL®, CLU®  
Financial Planning Director



**John Foreman, MBA, CIMA®**  
Investment Director



**Kate Cassidy, JD**  
Advanced Markets Director



**Matthew Teel, CFP®, CLU®**  
Director of Protection Products



**Niko Vamvakas**  
Retirement Products Consultant

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