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WAGNER

WEALTH MANAGEMENT

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Photography By **Jerry Coli** (CREM)

So you've hit the big time and you're feeling comfortable with your bank account. Maybe you've started your own business and are ready to identify the future leaders of your company. "Now what?" you ask. Now you call Wagner Wealth Management and let Dan Wagner and his team work with you to create a plan for your finances, your retirement, and set up effective succession strategies for your company.

Dan started in the money management industry as an unpaid intern at American Express 26 years ago

and never left. With a degree in business and a concentration in accounting and finance, Dan admits that he was "basically a late-stage accounting major who fell in love with the ever-changing and complex world of finance. Working with numbers that involve accounting and finance makes it extremely fun for me." Dan says that he truly loves helping people reach their goals, "especially very complex ones."

The Wagner Wealth Management firm helps high net-worth clients and business owners with complex financial planning, succession, and retirement strategies. Dan has a team of folks that can tackle any issue with taxes, insurance, business structure, real estate, credit, and/or trusts. His firm is also skilled at developing

strategies for business succession. "We are truly skilled and trained to provide comprehensive wealth management," Dan remarked and added, "We are a TRUE wealth management firm." In addition to the extensive scope of money matters that Wagner Wealth Management tackles, they also employ a true team approach. "Most firms have a team of people that share an office and a website but work on all their clients independently. We truly work as a team," Dan shared.

For example, Dan recounted the story of a wealthy prospective client (\$300 million net worth) who used a very large brokerage firm and national bank trust department for all investments, insurance, trusts, etc. "When we showed them our boutique, ●●●



customized approach at less cost, all their business was moved to us,” Dan said. The independent advisory side of the business (which is quite a change from the big brokerage firms of the past) is a trend that Dan feels is growing quickly, and something that Wagner Wealth Management does very well.

Dan’s firm also has a very strong commitment to local charities, angel investments, volunteer hours, and overall community betterment projects. “This is a very important part of who we are as a firm. Making the community we live in a better place is an achievement we all take very seriously,” Dan noted. He and his family live in Greenville, and Dan likes to boat on Lake Keowee as often as possible with his family and friends. He also likes to golf and hunt in his spare time.

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WORDS FROM WAGNER

Even though their upstate offices are in Greenville, Seneca, and Anderson, Wagner Wealth Management has clients all across the country.

Dan was an expert skier in high school and quit playing football in college.

Dan’s definition of success:
Happiness

What does Dan want to be remembered as?
Someone who treated all people equally and fairly.
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