



Daniel R. Meier, AWMA®  
Managing Wealth Advisor

Dan joined Ashton Thomas in 2020 as Managing Wealth Advisor of the firm's Peoria, Arizona office. With a decade and a half of experience serving clients, he has been a financial advisor since day one of his professional career.

"Success is dependent on effort," Dan says, speaking about his approach to financial planning. That may well be said of his life, in general. "While I am a true believer that hard work, focus, and effort will take you a long way, I also believe that financial services are best provided as a team of coordinating specialists. No one should be wearing more hats than they are qualified to wear or have time to wear effectively," he states. "A shared belief in this type of team approach, accompanied by leading-edge technology and a service model which enhances coordination of the whole team, are some of the many reasons I chose to partner with Ashton Thomas."

Dan was born and raised in Madison, Wisconsin. A "cheesehead" by birth, he decided to go "over the border" to the Carlson School of Management at the University of Minnesota, entering his studies at the age of 18 as a sophomore. Dan had accumulated enough college credits via advanced placement classes in high school to "skip" his

freshman year. During his collegiate career—and one might rightly call it that—Dan rowed crew for four years, pursued a triple major in corporate finance, investment finance, and entrepreneurial studies, and acquired a double minor in economics and business. While on the rowing team, he qualified his boat in the top 24 universities nationwide all four years he participated, with one national top-three finish. "At the time it was said that we had more national top-five finishes historically than any other sport at the University of Minnesota," he recalls.

Prior to graduating in 2005, Dan briefly considered a career in corporate finance, but decided to go the entrepreneurial route instead. This direction was inspired by a team project he participated in—and won—while a senior at Carlson. The entry in the school's entrepreneurial competition detailed a plan to redevelop the fourth floor of the Mall of America. In real life, Dan's path would take him in pursuit of a different kind of planning, one where he could work with and benefit families through one-on-one financial planning relationships. This marked the start of a career devoted to helping and serving others.

After receiving his degree from the University of Minnesota, Dan joined Ameriprise Financial.

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Starting as a Financial Advisor, he quickly ascended to the role of District Manager and Advisor Coach, with responsibility for overseeing a large team of advisors for the firm. Dan also served his office as a “Financial Planning Specialist,” working on advanced planning case design and guiding clients through the implementation of their financial planning strategies. After working in the planning function for some time, he decided to round out his skill set by moving into a portfolio management role.

In 2011, Dan joined AdvisorNet Financial as an independent practice owner, forming Insight Financial Group. This meant “starting from scratch” to develop a well-rounded practice covering financial planning, insurance, and investment management through model-driven, fee-based portfolios. During this time, he also pursued and attained the Accredited Wealth Management Advisor<sup>SM</sup> (AWMA®) designation through the College for Financial Planning to enhance his knowledge base as an advisor.

While affiliated with AdvisorNet, an opportunity presented itself for Dan to acquire ownership of and assume the leadership role for two businesses: Wealth Management International and Strategic Tax Planning. He was drawn to the strength of the professionals working for the two businesses and the many unique synergies their combined skill sets offered clients. As a result, Dan relocated his family to Arizona and became the owner of both firms, serving its clients as Lead Financial

Advisor and President, while continuing to refine and enhance the firm’s financial solutions and service model offering. He continued working in this capacity until joining Ashton Thomas in 2020.

“I’ve always believed in a true service model where all key professional stakeholders are communicating with each other under one roof, sharing joint accountability, and operating as part of a larger integrated team,” says Dan. “This means proactively and efficiently serving the client in a way few firms have been able to until now.”

Dan has been married to his wife, Renee, since 2011. They have three children—Clara, Gabe, and Cora—all of whom he “appreciates for the people they are becoming.” As a family, they love to entertain, cook (especially on the grill), and travel, with a remote lake house being their ideal vacation destination. Dan works out avidly and still rows every week, a regimen he shares with his father whenever he is in town to visit.

“I live for my family,” Dan says glowingly. “When other advisors ask me how best to serve their clients, I tell them to let the same motivation they have for serving their family drive them to do right by their clients.” Also, being a self-professed “big fan of Bobby Flay,” Dan genuinely possesses the “necessary ingredients” to help others achieve financial success.