

PENNYTREE ADVISERS, LLC

Biographical Information

*Quality Financial
Advice for All*



Dan Candura, CFP® provides financial advice and education to consumers and financial professionals. As President of PennyTree Advisers, LLC, a Registered Investment Advisory firm in Massachusetts, he provides personal financial planning for consumers, financial education counseling to employees in workplace settings and litigation support and forensic financial analysis services for attorneys. He is founder of his own education and consulting firm Candura Group, LLC. Dan teaches in the Sawyer School of Business at Suffolk University in Boston and is an NASD arbitrator.

Previously Dan provided leadership to the registered representatives of ING Financial Advisers LLC in New England. He joined ING Financial Advisers LLC in 2002 to develop the *ING Financial Horizons Advisory Service*. Earlier, he operated a professional financial planning practice south of Boston after serving as Vice President, Financial Planning Quality, in the Financial Advisory Services Group of American Express Financial Advisors in Minneapolis, MN.

Dan appeared as a featured expert on the 2008 PBS documentary *Retirement Revolution* airing nationally. He has been quoted in *USA Today*, *Investment News*, *The Journal of Financial Planning*, *Bloomberg's Wealth Manager* and other publications. A dynamic and engaging speaker, he presented hundreds of seminars and workshops across the country on topics ranging from the basics of financial planning to the future of quality within the financial services industry. Dan serves on the Board of Directors of The Certified Financial Planner Board of Standards, Inc. and is a past Chair of the Board of Professional Review. He chaired the Task Force on CE & Competency for CFP Board. He is also a member of the Financial Planning Association. He was a founding member and Co-Chair of the *Sales and Marketing Quality Council* of The Conference Board..

A 1971 graduate of Stonehill College, Dan entered financial services after a career as an educator and administrator. He earned a Masters Degree from Bridgewater State College in 1975 and received his designation as a CERTIFIED FINANCIAL PLANNER™ in 1987. He lives in Braintree, Massachusetts.

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