

For Immediate Release

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Dan Goldie Financial Services Partners with Loring Ward

San Jose, CA – To augment its portfolio management capabilities and client services, the independent advisory firm, Dan Goldie Financial Services LLC, has partnered with Loring Ward Financial Inc. (“Loring Ward”).

Dan Goldie Financial Services has more than \$300 million in assets under management and serves over 250 individuals and families, mostly in the San Francisco Bay Area. Founder and President, Daniel C. Goldie, has been recognized by the *San Francisco Business Times* as one of the top 25 Bay Area independent advisors, and by *Barron’s Magazine* as one of the top 100 independent financial advisors in the United States.

“Like all the 750+ independent advisors who work with us, Dan Goldie Financial Services understands the power of outsourcing its back office, reporting and trading to an experienced partner,” said Alex Potts, President and Chief Executive Officer of Loring Ward. “Our goal is to free Dan from time-consuming tasks, so he can spend even more time on building and enhancing client relationships.”

A former NCAA singles champion, Dan Goldie began his investment career as an independent financial advisor in 1991 after retiring from the men's professional tennis tour, where he was ranked as high as 27th in the world. He holds an A.B. in economics from Stanford University and an M.B.A. from the Walter A. Haas School of Business, at the University of California at Berkeley. He also is a Certified Financial Planner and a Chartered Financial Analyst.

Goldie believes that working with Loring Ward will help position his business for longevity and future growth.

“Working with Loring Ward will help ensure the long-term growth of our firm,” said Goldie. “And it will enhance the high-quality advice our clients deserve and have come to expect.”

About Loring Ward

Loring Ward International is headquartered in San Jose, CA. Its subsidiary, Loring Ward Financial Inc. provides a turnkey asset management program to more than 750 of America's most knowledgeable and successful investment advisors and their clients. These services include investment strategies and products, back office operational processing, education and training, and business development support. Loring Ward International is a wholly-owned subsidiary of Werba Reinhard, Inc. For more information, please visit www.loringward.com.
