WEALTHPATH
INVESTMENT ADVISORS

PARTNER PROFILE

Scott Daniel, AIF®

Managing Partner, Financial Advisor

Scott brings over two decades of financial planning and securities-related experience to WealthPath's Little Rock office. As a partner of WealthPath, he has assembled a close team of seasoned investment professionals with specialized finance, private banking, and insurance experience. He and his team are dedicated to personalized service and tailored independent advice.

He started his financial career at PaineWebber Private Client Group, which later merged with UBS. In 2003, he left to launch his own private wealth firm, Daniel Wealth Management. After 16 years of senior-level financial planning experience, he joined forces with WealthPath to offer a range of more diversified services for his clients, such as fiduciary retirement plan consulting for clients that are business owners.

While at Daniel Wealth Management, Mr. Daniel was named by the *Arkansas Business News* to the annual "40 Under 40" list of rising business stars in the state of Arkansas.[1]

He believes community involvement is essential and enjoys being involved. He has been an active member of Lions Clubs International, a Trustee on the Lyon College Board, a Commissioner for the Little Rock Parks and Recreation Commission, an executive finance board member of the Museum of Discovery, and Board President with the Juvenile Diabetes Research Foundation (JDRF) for six years where he also served on the regional board.

Away from work, Scott has four great, independent, and inspiring children. Dana, his wife of over 26 years, is fantastic, caring, passionate, courageous, and a faithful servant of Christ. He loves family time, all sports, and being outdoors.

1. Nominations were made by readers of AR Business and honorees were selected by editors of AR Business. Nominees had to be under the age of 40 at time of publication, had to have made an impact on their business or community and show potential to be a leader in business or politics during the next decade. No fee is charged to participate.

AREAS OF FOCUS:

- Holistic Wealth Management
- Employer sponsored retirement plans
- Investment selection and model-based asset allocation strategies
- Business succession planning and legacy planning
- Family asset protection and retirement planning
- Risk, liabilities, and cash needs analysis for companies and net worth analysis for individuals

DESIGNATION:

Accredited Investment Fiduciary®

EDUCATION:

Lyon College
Bachelor of Science

REGISTRATIONS HELD:

- Series 7, 63, 65
- Life and Health Insurance Licenses

CONTACT:

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