

## BIOGRAPHY

**DANIEL R. BURNS***Senior Financial Advisor***516-467-4080**[daniel.burns@wfafinet.com](mailto:daniel.burns@wfafinet.com)

For over a decade, Daniel has been by his clients' sides, tackling their financial concerns head-on by crafting strategies that fit them like a glove. From navigating major market shifts to honing his skills, Daniel has poured his heart into delivering top-notch, personalized investment planning throughout his career. His secret sauce? A research-based approach that's all about giving you crystal-clear insights and the confidence to own your financial game.

With a meticulously crafted plan, Daniel has got your back, steering you away from the emotional rollercoaster of hasty financial decisions or unforeseen money twists. He's not just a planner; he's your financial ally, helping ensure you stay true to your goals with a watchful eye on your progress. Because to Daniel, wealth isn't just about dollars and cents—it's about having the freedom to dive into the things that light up your life.



# HELPING CRAFT FINANCIAL SUCCESS STORIES

**EXPERIENCE**

Daniel kickstarted his Finance journey at Bear Stearns, evolving from a clerk to a savvy investment advisor. In 2008, he dove into public investment advice at David Lerner Associates, mastering fixed income and cash flow investments. Joining Wells Fargo Advisors in 2015, he leveraged their vast resources to guide clients with precision. Shaped by a family of Firefighters, Daniel treasures the joy of serving others. Armed with a Finance degree from Wagner College and post grad classes with NYU & Yale, he's your go-to professional for tailored financial strategies.

**AWAY FROM THE OFFICE**

Daniel, a New York native, lives on Long Island with his wife Linda and two sons. Beyond his finance career, he's recognized as a community champion, earning accolades for his involvement with Dale Carnegie Training of Long Island. He remains committed to backing various charities including Ronald McDonald House & the Vestibular Disorders Association (VeDA). In his free time, Daniel explores culture through travel & the arts, while also indulging in his passion for fitness.

**SURPRISING REVELATIONS**

Growing up, his parents taught him the value of honesty—the whole 'If I lie, it will take 100 more to cover' really stuck. Guilty pleasure? Definitely ice cream. As for his mantra, "they don't care how much you know, until they know how much you care." When it comes to what he wants people to remember, it's the connections he forged for causes close to his heart and the positive vibes he brought to every interaction. And oh, the last time he laughed until he cried? "My wife manages to pull that off at least once a week."