



Financial Advisors of Delaware Valley

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**Financial Advisor**

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As a daughter and granddaughter of entrepreneurs and business owners, Danielle witnessed, first hand, the inner workings of closely held businesses. Starting at age five she worked with her grandfather on the adding machine in his office. Continuing at age twelve she worked in her father's office paying bills, balancing the check book and talking to customers who called to set up appointments. Danielle was drawn to the mathematical side of things but also loved working with people. In college she became a tutor in statistics, where she combined her love of mathematics with her talent for explaining complicated concepts in understandable terms. This would be a precursor to her future career.

Today Danielle enjoys working with individuals and owners of closely held businesses. She specializes in business planning issues, including buy-sell agreements and business continuation planning. Danielle believes in open communication with her clients. If a client does not know or understand the reason behind a certain strategy, she will not encourage a client to move forward with a proposed plan until the client can see the whole picture.

Danielle has formed an alliance with John L. McKeever III, CLU<sup>®</sup>, ChFC<sup>®</sup>, a successful and experienced financial planner. Working with John's team enables Danielle to offer her clients extensive resources and value added services in the areas of financial planning, retirement planning, investment management strategies, estate planning and risk management strategies.

Danielle holds her Life and Health Insurance license as well as her Series 6, 7, 63 and 65 FINRA registrations.

Danielle serves on the board of the Exton Chapter of LeTip International. She is involved with the Philadelphia Chapter of the Boston University Alumni Club. She also works on the Committee to Benefit the Children at St. Christopher's Hospital. Danielle lives in Thornton, Pennsylvania with her husband James. She enjoys traveling and donating her time to raise money for worthy charities. She feels it is important to give back for all of the blessings she has received.

Offices in  
Delaware ♦ Pennsylvania ♦ New Jersey ♦ Maryland

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