

## **Dan Goldie Financial Services LLC Reports Double-Digit Asset Growth in 2009**

*Dan Goldie Financial Services LLC, an independent financial advisory and financial planning firm in Menlo Park, California, reported today the firm's assets under management grew to over \$350 Million as of December 31, 2009.*

January 11, 2010 (FPRC) -- Dan Goldie Financial Services LLC announced today that the firm's assets under management grew to over \$350 million in 2009. The firm's portfolios benefited from positive returns last year as global equity markets experienced significant growth since in March, finishing the year with strong gains.

"Our clients were rewarded for staying invested in 2009 even though times were scary early in the year when the economic outlook seemed dismal," said Dan Goldie, President of Dan Goldie Financial Services. "At a time when many other investors were selling equities, we worked hard to help our clients understand the potential benefits of maintaining a diversified, long-term investment strategy. I believe this benefited them not only last year, but also over the last decade or so of low returns for the broad U.S. stock market."

Dan Goldie Financial Services manages balanced portfolios of equities and fixed income securities for individual investors. The highest returns for the firm's clients in 2009 came from international equities, where the firm normally invests about 30-40% of a client's equity allocation. U.S. investors holding international securities benefited from the falling value of the U.S. dollar, which added to the returns from local international markets.

Mr. Goldie said, "Recent times have been difficult for investors, but our experience is that those who remained disciplined and held diversified, multi-asset portfolios made it through better than most. We are pleased to have played a part in helping our clients navigate today's difficult financial waters and to have seen a resumption of growth in assets under management."

### About Dan Goldie Financial Services

Dan Goldie Financial Services LLC is Registered Investment Advisor located in Menlo Park, California. The firm manages diversified investment portfolios and financial advisor for individuals and families, helping them manage their wealth and make smart financial decisions.

Dan Goldie is President of Dan Goldie Financial Services and has been an independent financial advisor and financial planner since 1991. Mr. Goldie is a former professional tennis player and co-author of *The Prudent Investor's Guide to Beating the Market at Its Own Game*. He has an A.B. degree in economics from Stanford University and an M.B.A. degree from the Walter A. Haas School of Business at U.C. Berkeley. He has earned the Chartered Financial Analyst designation and is a CERTIFIED FINANCIAL PLANNER™ certificant.

### **Contact Information**

For more information contact Dan Goldie of Dan Goldie Financial Services LLC  
(<http://www.dangoldie.com>)  
(650) 566-1121

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