

Announcing 'Check-up 2010' A Complimentary Financial Review for Individual Investors

Dan Goldie Financial Services LLC, an independent financial advisory and financial planning firm in Menlo Park, California, announced today that it is offering a complimentary financial review for individual investors with portfolios of \$1 million or more.

February 19, 2010 (FPRC) -- Dan Goldie Financial Services LLC, an independent financial advisory and financial planning firm in Menlo Park, California, announced today that it is offering a complimentary financial review for individual investors with portfolios of \$1 million or more. 'Check-up 2010' gives individual investors a chance to have their financial and investment strategy reviewed without cost of obligation by an independent advisor.

'Many investors are uncertain about their portfolios after the financial and economic downturn in recent years,' said Dan Goldie, President of Dan Goldie Financial Services. 'We are offering a complimentary portfolio review to help investors better understand their investments, the risk factors to which they are exposed, and the markets in which they are invested. We believe in sharing our knowledge to help people become smarter and better informed investors, whether they choose to work with us or not.'

Dan Goldie Financial Services manages balanced portfolios of equities and fixed income securities for individual investors including personal financial planning guidance. The firm follows long-term, strategic investment policies for clients utilizing highly diversified, asset-class investment strategies. The firm prepares a written investment policy statement for every client at the beginning of the client's relationship with the firm, which is updated when appropriate to insure a timely and consistent approach is followed.

Mr. Goldie said, 'Our belief is that discipline and education are key components of a successful investment experience. Recent times have been challenging for many investors. Some have gotten off track by making emotional decisions caused by stress and uncertainty. We look forward to helping investors understand how they might be able to improve their investment portfolios and make thoughtful, educated decisions with their money in the future.'

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 is a 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.

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