

## **Dan Goldie Interviewed by Dow Jones/WSJ Financial Adviser**

*Dan Goldie Financial Services LLC, an independent financial advisory and financial planning firm in Menlo Park, California, announced today that its President, Dan Goldie, was recently interviewed by Dow Jones/WSJ Financial Adviser regarding the benefits of outsourcing.*

April 9, 2010 (FPRC) -- Dan Goldie Financial Services LLC, an independent financial advisory and financial planning firm in Menlo Park, California (<http://www.dangoldie.com>), announced today that its President, Dan Goldie, was recently interviewed by Dow Jones/WSJ Financial Adviser regarding the benefits of outsourcing the back-office operational functions of his business.

Mr. Goldie told WSJ Financial Adviser that outsourcing back-office business functions allows him to devote himself completely to his clients, and that he has run his business very effectively this way since he became a full-time financial advisor in 1991.

The article can be found at this website:

<http://financialadviserblog.dowjones.com/blog/financial-planning-basics/0/0/voices-dan-goldie-on-the-benefits-of-outsourcing>.

WSJ Financial Advisor quotes Mr. Goldie as saying, "My objectives have always been to maintain my independence and never to have any employees, so I can focus 100 percent of my time and effort on my clients, solving their problems and helping them make smart decisions. Managing portfolios and providing financial planning assistance is what I do best. So I try to outsource as much of everything else as I possibly can."

Dan Goldie Financial Services outsources operational activities in an attempt to run a more efficient, client-focused business. The firm believes that hiring outside experts to help with portfolio rebalancing, securities trading, and client reporting, among other things, allows the firm to develop closer relationships with clients and provide more a more complete service with better advice.

About Dan Goldie Financial Services

Dan Goldie Financial Services LLC (<http://www.dangoldie.com>) 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 (<http://www.dangoldie.com/aboutUs.html>) 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

**Keywords**

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