Wealth & Institutional

Daniel Kostaroff, CFA, CFP®

Partner

Investment-related Experience: 14 years
Years with Firm: 11 years

As a partner and founding member of LSIA, Dan provides holistic financial planning to individuals and families with the goal of building and protecting their wealth. To ensure all financial aspects of his clients' lives are well cared for, he acts as their personal Chief Financial Officer, offering guidance on a variety of important matters, including investments, retirement income, risk management, tax planning, insurance and estate planning.

In a relatively short period of time, Dan has elevated himself as a leader in the business and financial communities. His unique vision and understanding of clients' needs helped launch LSIA Wealth, a division of LSIA committed to helping bring financial peace of mind to individuals and their families. Today, Dan leads the LSIA Wealth initiative, providing innovative ideas to help his clients live a life of significance and leave a positive legacy.

Dan is a knowledgeable and strong presence within the financial community. Before reaching age 30, he attained the Chartered Financial Analyst® designation, considered the highest distinction within the investment management profession, and the CERTIFIED FINANCIAL PLANNER™ certification. He currently shares his visionary knowledge and expertise as a board member for CFA Detroit and is also a member of the CFA Institute and Financial Planning Association.

In his spare time, Dan is an active volunteer with Woodside Bible Church and throughout his community, helping those less fortunate and taking part in city block clean-up initiatives to improve local neighborhoods. Dan also enjoys landscaping, ice hockey, working out and spending time with his wife Christen and their family.

PROFESSIONAL AFFILIATIONS

CFA Detroit - Board Member
CFA Institute - Member
Financial Planning Association - Member

WORK EXPERIENCE

Portfolio Management Partners - Portfolio Manager
StraightLine Advisors - Research Analyst
Plante Moran Financial Advisors - Financial Planner

EDUCATION AND ACCREDITATIONS

Michigan State University - Bachelor of Arts
Chartered Financial Analyst®
CERTIFIED FINANCIAL PLANNER™ professional

Years with Firm include tenure at LSIA and Portfolio Management Partners (formerly a division of Natixis Asset Management Advisors, LP, now Ostrum Asset Management). Ostrum Asset Management is an affiliate of Natixis Investment Managers.

Our guidance. Your peace of mind.