

Living Your Legacy

Freedom Street Partners CEO Scott Danner has a message for wealth managers: Sometimes the planners need a plan.



Throughout a long career in wealth management, Scott Danner, AAMS®, financial advisor, and CEO of Freedom Street Partners, has never been a dry numbers guy. It's his warmth, passion, and care that have transformed his clients' lives and built his company to include nearly 50 advisors in seven states, managing close to \$3 billion in assets.

And Danner's just getting started. His career as a writer, coach, and speaker focuses on a segment of the industry he understands well: business owners themselves.

"I've worked with clients—including business owners across virtually every field—helping them build wealth, clarify their goals, and create the legacy they want for themselves and their families," explains Danner. "But increasingly, I've been coaching business owners like me who are poised for their next step but aren't sure how to proceed." Those next steps might include the sale of a business, a merger, or the transition of a beloved wealth management firm to new hands.

The Right Steps

Many financial planners who started in the 1990s or early 2000s are coming to a crossroads, explains Danner. They've created something truly powerful—a vibrant company and deep

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friendships with colleagues and clients.

"How do you walk away from something like that?" Danner asks. "One thing's for sure: A little more golf and a little less work is not a step-down plan. Most of the advisors I coach have spent their careers helping clients plan for the future, but they haven't begun to ask themselves those same questions." Danner challenges his advisor clients to consider four essential quadrants of life: family, work and wealth, spirituality, and health. How will these be impacted as they move intelligently into change?

He's taking his own advice to heart, finding creative ways to spark

positive, inclusive dialogue about the broad benefits of planning for life and legacy. Danner is frequently interviewed on finance-related blogs and podcasts, has his own YouTube channel, and speaks at conferences and other events.

"It's not retirement. It's a new chapter," he says. "Don't let your business dwindle away. Let's make a plan that helps you live your legacy, not just leave one."



scottdanner.com

Scott Danner's book, *Freedom Street: How I Learned to Create a Rich Life, Live My Legacy, and Own the Future as a Financial Advisor*, acts as a resource for those looking to enhance their career and secure their future. Danner uses stories from his life and the wisdom gleaned from his career in the highest echelons of wealth management to put forth a fascinating, practical philosophy that focuses not just on building wealth, but on crafting a life rich in fulfillment and authenticity.

"Whether you're an advisor or business leader in the midst of selling or merging, or just ready to take an honest, clear-eyed view of life's next chapter, this book can be an invaluable guide," he says.

