

Advisor Showcase – Deborah Danielson Takes a Vintners Approach to Building Her Business Her Way

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Vintage Years

In financial professional circles, Deborah Danielson is a consummate industry veteran. A Certified Financial Professional (CERTIFIED FINANCIAL PLANNER Professional TM) for more than 40 years, she joined LPL Financial's predecessor company, Private Ledger, in 1981 (eight years before the merger of Private Ledger and Linsco resulted in the inception of LPL Financial), and founded her Las Vegas-based company, Danielson Financial Group (DFG).

"I started with Private Ledger from the very beginning. I didn't know that you weren't supposed to go independent without any clients, but that's exactly what I did," she said.



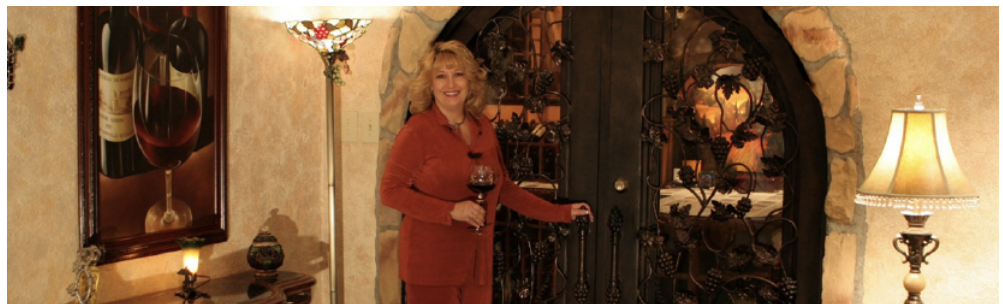
"When we look at asset allocation, it's similar to the blending of different grapes. You might want one for boldness, one for tannins, and one for being fruit-forward, just like the variety in your portfolio: healthcare, gold, infrastructure; there are many different things that blend a portfolio,"
Deborah Danielson, CFP, Danielson Financial Group

With a client-focused approach to financial planning, Deborah soon began growing DFG, while earning a reputation as an industry expert with her financial acumen. As a result, her list of industry accolades over the years is punctuated by an impressively lengthy run of annual achievements including:

- *Barron's* Top 1,000 Financial Advisors in America: 2014-2021
- *Barron's* Top 100 Women Financial Advisors: 2008-2021
- *Forbes* Top 200 Wealth Advisors: 2016-2021

A regular on FOX Business and CNBC as well as a contributor to *Money* magazine, *The Wall Street Journal*, *Dow Jones Wire*, and *Bloomberg*, Deborah routinely shares her financial insights with a national audience that's come to trust her insights and advice; success that's the result of painstaking preparation and planning.

"I attribute my success to having a good business plan with goals I review. I was in strategic coaching for 13 years and I learned a lot about goal setting. No matter what the challenge is, you have to figure out how to get around the obstacle and get things done," she said.



Breaking Down Barriers

With a team of 17 professionals, DFG is a successful practice despite significant industry discrimination. “Being a woman financial planner in the industry back when I started was very difficult. You were totally in a man’s world. Everyone wondered what you were doing there. Even the person who taught the test for the Series 7 said that women don’t belong in this business. I was shocked,” she said.

However, Deborah’s quick to point out how much has changed over the past four decades. “Today, it’s so much better. It’s not unusual to have women in the business. Even though we’re not the majority, people respect our right to be here, which is excellent. LPL has been very supportive. We have women’s conferences. They realize we’re a very positive force,” she said.

Moonlighting

Wealth management is not Deborah’s sole professional pursuit. A nearly 40-year passion for the artistry of making wine led to her earning an advanced certificate with merit for wine education. “I’m very proud of it, and several years ago I decided to use my education and pivot to winemaking, she said.”

For the past 12 years, Deborah’s produced an annual vintage with the help of her office staff. “I’m the winemaker. I do the actual winemaking, but they help me with the crush, the distending, the bottling, and the labeling,” she said.

In addition to the many high-profile awards she’s earned for her wealth management skills, she’s earned her fair share of high-profile awards for her wines as well.



Common Denominators

Deborah attributes her winemaking success to the same factors that help DFG to flourish. “To be a successful winemaker as well as a successful investor, you definitely need to have a plan. You need to stay on course and track where you’re at. You need to react to obstacles that’ll come up, whether they’re planned or unplanned. I think you need to have the patience to stay the course and not jump out too quickly. You really need to have intellectual reasons for making changes, not emotional reactions,” she said.

Beyond the personal attributes she brings to both endeavors, Deborah cites numerous parallels between wealth management and winemaking. “When we look at asset allocation, it’s similar to the blending of different grapes. You might want to have one for boldness, one for tannins, and one for being fruit-forward, just like the variety in your portfolio: healthcare, gold, infrastructure; there are many different things that blend a portfolio,” she said.

Marking a milestone

Later this year, Deborah will celebrate DFG’s 40-year anniversary with a special wine she’s produced with South African grapes. “I want to do something different this year, so this wine will represent my 40-year legacy. It’ll be a really fun wine. The bottle will have pictures of me from 1981 to the present, and we’ve underlaid a stock market graph. The graph is literally the real stock market return growth over that time. Luckily, it’s on a nice uptick,” she said.

Barron’s awards are based on assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work.

The Forbes ranking of America’s Top Women Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors with a minimum of seven years of experience and weighing factors like revenue trends, assets under management, compliance records, industry experience and best practices learned through telephone and in-person interviews. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receives a fee in exchange for rankings.