



Dan Borten

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Background & Experience

Dan has more than 30 years of experience driving insurance sales on a wholesale and point-of-sale basis. He enjoys simplifying complex problems and finding the most relevant insurance products to solve them. This consultative and collaborative approach helps customers and advisors make informed decisions around a wide range of risk management, business, and legacy planning needs.

Born in NY, raised in MD and educated in PA (Lehigh University; B.S., Finance), Dan joined the insurance industry in 1983. For 11 years he worked for a specialty broker in the non-qualified deferred compensation market, rising from Financial Analyst to Sr. Vice President and Sr. Account Executive. Dan also has over 10 years of wholesaling experience with MetLife and Prudential. He was the top Sales Director in 3 of his 6 years with MetLife and twice qualified for Chairman's Council. Dan left MetLife in 2003 to pursue the idea of combining regulatory benefits under the CRA with the tax benefits of BOLI and obtained a US Patent. From 2015 to 2017, Dan ran H. Beck Insurance Services, where he engaged Pinnacle as a strategic partner to help H. Beck's 500+ advisors incorporate more insurance into their planning process.

Certifications & Education

- Lehigh University, Bethlehem, PA - Bachelor of Science, Finance, 1983