



Daniel G Schorgl, LUTCF

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Background & Experience

Dan brings more than 18 years of experience in the insurance and financial services industry to his position with PLAN. In this position since 2001, Dan covers the Midwest territory of Kansas, Missouri, Nebraska, and Iowa working with independent and institutional advisors whose areas of expertise include wealth accumulation planning, estate planning and business succession planning. His mission is to help financial advisors and insurance professionals grow their businesses with high-net-worth clients, business owners and professionals. Through providing consulting services to these advisors, he works to create trusted partnerships to deliver their clients customized solutions and outstanding sales support. Dan sets himself apart from his competitors by offering a full range of comprehensive service and support, broad carrier and product knowledge, clinical underwriting expertise, large case management and presentation assistance.

Dan earned his B.S.B.A degree from Rockhurst College, majoring in management/finance. He earned his LUTCF designation in 1992 and is licensed as a FINRA Series 7 General Securities Representative, Series 63 NASAA Uniform Securities Agent State Law and FINRA Series 24 General Securities Principal. Dan has been a member of AALU, GAMA and the Kansas City Estate Planning Society. He has also served on the board of directors for the Kansas City branch of NAIFA and is attendee of the International Forum.

Dan resides in Leawood, Kansas with his wife, Julie, and their three children, Bryan, 29, Grant, 25 and Amy Gayle, 24. He enjoys golf and is actively involved in Boy Scouts, serving the District Council and Troop 10 (City of Leawood) in various roles.

Certifications & Education

- Rockhurst College, Kansas City, MO - B.S., B.A, Management and Finance