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NORTHBROOK Financial Planner Celebrates Three Decades in Business

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NORTHBROOK — For 30 years, financial planner, Daniel Fisher has been on his own. Versus working for a big brokerage firm, it's just him. And, he prefers it that way.

"I offer personalized, one on one service," said Fisher, owner of his Northbrook financial planning firm, Fisher Financial Group, LLC. "This isn't a revolving door. I'm not going anywhere."

Fisher is a fee-based financial advisor who works with individuals, families, retirees and small corporations to preserve and protect their wealth through comprehensive financial planning. Areas of planning include insurance, tax management, estate planning, retirement planning and capital accumulation.

"I sit down with my clients and interview them to find out what their needs are, to lead them to the path of where they need to go," he said. "We address things like putting kids through college and a successful retirement plan. I try to put them in a better place than they are right now."

Fisher, who holds a degree in business administration and a series 65 license previously worked in accounting, which he said led him to focus a lot of his business on accountants.

"I can relate to them and I can talk their language," said Fisher, who holds continuing education programs at his office for CPAs for the purpose of educating them on current financial products, building relationships and obtaining referrals from them.

Fisher Financial, which has two other employees, an office manager and a CPA is a fee-based firm, meaning clients are charged a flat fee based on their asset value versus commissions on every trade.

“I take a more holistic approach to a person’s financial goals,” he said, “I’m looking at the whole picture, and how I can grow and protect their portfolio versus buying and selling individual stocks. I’m not just offering products, I’m offering a whole package.”

Fisher said he typically uses the help of model portfolios, which come from experts who are “advisors to the advisors.” He said his goal is to help people protect their money in bad times and help them benefit when the market is doing well.

He describes his philosophy as “winning by not losing,” and said that begins with building a foundation of safe investments and then building upon that.

Agnes Brassfield is a Northbrook-based CPA who is a client of Fisher’s. She also recommends him to many of her clients.

“I’m always looking out for my clients and their money, and Dan is very honest,” said Brassfield, who has known Fisher for about five years. “He’s knowledgeable and he’s not pushy. I trust him.”

“He takes a personal interest in you, in other words it’s not just business,” said Ruthann Normann, who has been a client of Fisher’s for 17 years. “I’ve had a couple of tragedies and Dan has been right there supporting me and making sure everything is taken care of financially.”

When asked why he’s been successful for three decades, Fisher said it all comes down to being a good listener.

“You have to find out which direction to take a person in their financial life, and the only way you know is to listen to their pain and their angst and their goals,” he said.

“He’s done very well for us,” said Normann. “Whenever he thinks there’s something better than what you have, he doesn’t hesitate to contact you and make suggestions.”