



M. Shannon Dana, CFP®

After graduating from South Dakota School of Mines and Technology in 1994, Shannon Dana worked as a manufacturers' representative working with over 200 small business owners helping them grow their businesses.

In January of 2000, Shannon began helping individuals and business owners plan their financial futures and manage their investments as a financial advisor for a nationally known investment company.

Shannon earned his CERTIFIED FINANCIAL PLANNER™ certification in 2003. In addition to being a CFP® professional, Shannon holds series 7 and 66 licenses, as well as licenses in Life, Health and Variable insurance. Shannon also holds a series 24 (Registered Securities Principal) license.

When not helping people manage their money and plan for their future, Shannon stays busy as an adjunct professor for the College for Financial Planning. He teaches other financial professionals who aspire to earn the highly regarded CFP® mark. Subjects in these courses include the financial planning process, risk and insurance management, investment planning, retirement planning and estate planning.

Shannon currently resides in Denver, CO with his lovely wife, two daughters and son.