



MEET WITH YOUR ADVISOR

Daniel Goeddel, MBA

Partner, Chief Development Officer & Lead Advisor

Click the meeting you would like to schedule with me below.



INITIAL MEETING

Introduction to our firm and process. It allows us to get to know each other and see if we are a good mutual fit.



CLIENT CARE MEETING

We prioritize time-sensitive needs and requests, such as discussing recent trades or urgent retirement updates or scenario requests.



Dan is focused on bringing more value, better technology, and deeper transparency to clients at GWS.

