

Dan Mendelson

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Dan Mendelson

Email Address dmendelson@rockco.com

Company: Rockefeller Capital Managment

Website:

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Telephone: 312-681-7611

Title: Managing Director

Bio: My team and I work tirelessly to help our clients achieve their life goals through proper financial planning. We ask the right questions to get to the heart of our client needs and desires, then spend substantial time listening to ensure we are all on the same page. Our clients have a myriad of goals ranging from capital preservation, to income, to high growth, to philanthropy and legacy planning, etc. We then apply solutions that are both cost and tax effective. In addition to our work with families, we manage retirement plans for small to mid-size businesses.

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