



DANIEL M. TAYLOR

KEY CLIENT DEVELOPMENT MANAGER

DAN TAYLOR joined Transamerica in 2010, bringing more than 11 years of investment and retirement plan experience. As Key Client Development Manager, Dan provides outreach and education to aid in the growth, and development of specialty-markets retirement plans.

“The correct answers come from the right questions.” With a passion for people, Dan is driven by finding better solutions for his associates. He excels in presentation, communication, and analytical thinking, and serves as a consultant to advisors and employers facing the complexities of retirement plans and regulation. He presents via all channels: phones, webinars, and seminars.

Prior to Transamerica, Dan was a financial advisor for three years. Prior to that, he was a counselor at a troubled-youth center for a year.

Dan lives in Cedar Rapids, Iowa, with his wife, Laura, daughter, Alice, and son, James. He has eclectic hobbies ranging from horticulture/landscape design to producing electronic music. His recreational activities include fishing, gym, running (begrudgingly), food (happily), and family events (favorite). Ultimately, he tries to “keep the main thing, the *main* thing.”

Background

EDUCATION

BA in Psychology, Minor in Economics, Dean’s List
University of Northern Iowa

CURRENT RESIDENCE

Cedar Rapids, IA

Get in touch



EMAIL

Daniel.Taylor@Transamerica.com



CALL

319-355-1234



VISIT

Transamerica.com

At a glance

- Joined Transamerica in 2010
- 11 years of investment and retirement plan experience
- Former President, Treasurer, of Transamerica Professional Network

Accreditations

- FINRA Series 7, 63 Registrations
- Iowa Life Insurance License
- LOMA, ALMI

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