

Dan E. Baer, CPA, PFS
Principal, Senior Financial Advisor



Dan Baer heads one of HBKS's client-servicing teams. He joined Hill, Barth & King LLC (HBK) in 1979 and opened the Naples, Fla. office in 1985. In addition to his core work as an advisor to individuals and families, he has been instrumental in changing the firm's service model, chairing the committee that developed the strategy that resulted in the transition from a traditional CPA firm to providing a full range of holistic financial services.

"Key to our holistic approach, we conduct meetings on the front end of a relationship to determine a family's needs, so we can form the relationship around those needs," he explains. "Whether the focus is on the investment portfolio or family issues like estate planning and family gifting, we ask a lot of questions and work hard to be good listeners before we develop and implement a financial plan. Then we meet regularly to ensure the plan remains consistent with the client's needs and is adjusted to reflect changes in the client's financial condition and goals as well as the markets."

Mr. Baer is a CPA and holds the distinguished designation of Personal Financial Specialist, awarded by the American Institute of Certified Public Accountants to CPAs who can demonstrate knowledge and expertise in personal financial planning. He is well versed in the financial markets, and has served on the firm's executive as well as strategic planning committees. His career work has been as an advisor, helping individuals and families negotiate the wide range of complex financial issues that impact individuals who have amassed substantial wealth. His work and expertise extends to estate planning, philanthropic issues, family business matters, cash management, personal tax matters and retirement planning.

Mr. Baer graduated Summa Cum Laude with a Bachelor's degree in Accounting from Kent State University.

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