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Dan graduated from the University of Ottawa with a Bachelor of Commerce (Honours) degree, and then obtained a graduate diploma in public accountancy from McGill. He worked with KPMG before heading into a large high-tech firm to handle some of their tax issues, and then joined Metropolitan Life as their manager of Advance Sales before moving to London Life more than eighteen years ago.

Dan is a member of the Canadian Institute of Chartered Accountants, the Institute of Chartered Accountants of Ontario, the Canadian Tax Foundation, the Conference for Advanced Life Underwriting (CALU) and the Society of Trust and Estate Practitioners (STEP).