**Daniel M. Zugell, CLU, ChFC, LUTCF, AEP**

**Director/Senior Vice President**

**Business Transition Advisors, Inc.**



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Description automatically generated with medium confidence

“Dan the ESOP Man” Zugell is Director/Senior Vice President of the national consulting firm, Business Transition Advisors, Inc. (BTA) in Central & Eastern U.S. BTA is a highly regarded business succession firm specializing in the education, analysis, design, financing and implementation of Employee Stock Ownership Plans (ESOP).

Dan’s experience spans many financial service disciplines including insurance, executive benefits, disability income and numerous ESOP facets. Dan gained special expertise in corporate repurchase liability financing inherent to ESOPs as Regional Director for MetLife’s Institutional Specialized Benefit Resources. Overall expertise in the analysis, design, financing and implementation of ESOPs was launched as Executive Director/Practice Leader of GenAmerica’s and MetLife’s ESOP Departments.

Dan remains a prominent and nationally respected expert, thought- leader, author and speaker on ESOP related matters. Dan has been published in the prestigious Journal of Financial Service Professionals and Wealth Counsel Magazine and a contributor to TD Ameritrade’s Institutional Advisor Solutions, Employee Benefit Advisor and others.

Dan holds a B.A from Grove City College and designations from The American College including Chartered Financial Consultant, Chartered Life Underwriter and Accredited Estate Planner. Dan is a member and Past-President of the Society of Financial Service Professionals-Pittsburgh Chapter, Past-Chair of the Pittsburgh Business Ethics Awards, Member of the National Association of Estate Planning Councils, The ESOP Association, National Center for Employee Ownership and Founding Member of the Pennsylvania Center for Employee Ownership.