

Chris Dancy

Financial Services Representative
Principal Securities Registered Representative
Financial Advisor



Ready to focus on your financial goals? I can help.

Your goals — my focus. Let's put the strategies together to work for you. Whether your priority is personal finances, your business, or both, I'm committed to helping you succeed.

Let's connect to get started:

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Visit my LinkedIn Page! [Chris Dancy](#)

Chris Dancy is a financial professional, providing financials strategies for individuals and businesses in the Northern California area. His passion for this field is grounded in his extensive business background with several organizations both domestic and world-wide, coupled with his deep belief in the value of partnering with individuals and businesses to create a lifetime strategy for managing their finances with strategies tailored to help meet their financial needs. Chris brings to this discipline over 30 years of executive level experience with international and domestic companies in the areas of domestic and international operations, sales and marketing, World-Class Manufacturing, business strategy development, and global Enterprise Resource Planning logistics. With this extensive experience, Chris provides a holistic understanding of the unique needs of individuals and businesses, and a focused awareness of the critical elements required to help clients in achieving individual and corporate financial goals.

Chris is a Financial Services Representative with Principal[®] and a Registered Representative with Principal Securities, Inc. who assists individuals, families, executives, and business owners in the following areas:

- Retirement Income Planning
- Non- Qualified Executive Benefits
- Qualified Plan Distributions
- Investment Strategies
- Educational Funding
- Disability Income Insurance
- Estate Planning
- Business Exit Planning

Chris currently holds Series 6, & 63 Securities Registrations, as well as a California Life & Health Insurance License. He has been on several local and national non-profit boards, and has received wide recognition and rewards for his business achievements in business development, global sales and marketing achievement, and leadership development. He is very active in the local business community. He is a 23-year resident of Rocklin, where he lives with his wife Lana. They consider themselves blessed to have their daughters, son-in-law, and grandsons in the community.

Insurance products issued by Principal National Life Insurance Company (except in New York), Principal Life Insurance Company and the companies available through the Preferred Product Network, Inc. Securities and advisory products offered through Principal Securities, Inc., 800/247-1737, [Member SIPC](#). Principal National, Principal Life, the Preferred Product Network, and Principal Securities are members of the Principal Financial Group[®], Des Moines, IA 50392. Chris Dancy, Principal National and Principal Life Financial Representative, Principal Securities Registered Representative, Investment Adviser Representative. *t16120108gw*