



Dayton & Sydney Wealth Strategies Group - Extensive Capabilities

We provide wealth protection, asset management, and financial and estate strategies through a broad range of products and services. This expansive network allows you breadth and depth of options in working toward your financial well-being.

Investment¹

► Fixed Income Investments

- Mutual Funds (income-oriented)
- Unit Investment Trusts (income-oriented)
- Municipal and Government Bonds
- Money Markets
- Certificates of Deposit

► Equity Investments

- Mutual Funds (growth-oriented)
- Large Cap Growth/Value Funds
- Small/Mid Cap Growth/Value Funds
- International Equity Funds
- Asset Allocation Funds
- Sector Funds
- Unit Investment Trusts (growth-oriented)
- Publicly Traded Stocks

► Retirement/ Education Planning

- Traditional IRAs
- Roth IRAs
- SEP IRAs
- SIMPLE IRAs
- 401(k) Plans
- 403(b)(7) Plans (non-contributory)
- 403(b)(1) Plans
- Pension Plans
- Profit-Sharing Plans
- Keoghs
- Coverdell Education Savings Accounts (formerly Education IRA)
- 529 Plans

► Investment Accounts

(Traditional Brokerage)

► Investment Advisory Programs

Life insurance and annuities are issued by AXA Equitable Life Insurance Company (New York, NY) and by various unaffiliated carriers, and are offered through AXA Network, LLC. Disability income insurance, long-term care insurance, and health insurance are underwritten by unaffiliated carriers and are offered through AXA Network. AXA Network does business in California as AXA Network Insurance Agency of California, LLC, and in Utah as AXA Network Insurance Agency of Utah, LLC. Securities are offered through AXA Advisors, LLC (NY, NY, 212-314-4600), member FINRA/SIPC. Investment advisory products and services are offered through AXA Advisors, LLC, an investment advisor registered with the SEC. AXA Network, AXA Advisors and AXA Equitable are affiliated companies and do not provide tax or legal advice. Dayton & Sydney Wealth Strategies Group is not owned or operated by AXA Advisors or AXA Network. PPG-124865

Risk Management

► Life Insurance

- Annual Renewable Term
- Level Term – 10-, 15-, 20- Year
- Whole Life
- Universal Life
- Variable Universal Life
- Survivorship Variable Universal Life
- Survivorship Universal Life

► Annuities

- Fixed (single premium & immediate)
- Variable Annuities (immediate & flexible payment)
- Group Annuities (qualified retirement plans)
- Equity Indexed Annuities

► Disability & Long-Term Care Insurance

- Individual Disability Income
- Group Long-Term & Short-Term Disability
- Business Overhead Expense
- Disability Buyout Protection
- Individual & Group Long-Term Care

► Health Insurance

- PPO
- Indemnity Plans
- Individual & Group Medical Plans
- HSA
- Medigap

► Business Planning

- Executive Bonus Plans
- Business Continuation Plans
- Key Person Plans
- Split Dollar Plans
- Group Carve Out Plans
- Salary Continuation
- Deferred Compensation Plans
- Executive Planning Services
- Buy-Sell Agreements²

1. Investments are subject to market risks, will fluctuate and may lose value.
2. AXA Advisors and AXA Network do not provide tax or legal advice. Please consult your tax and/or legal advisors regarding your particular circumstances.