



FACT SHEET

PLAN – PROTECT – PROVIDE

WHO WE ARE

- A boutique financial services firm focusing on all areas of wealth accumulation, financial planning and risk management.
- Members of the Elite Advisors Group.
- A growing team of passionate and driven financial professionals with a combined experience of over 100 years in the industry
- Founded in 2002 by Dana Sydney and Kevin Dayton

INDUSTRY RECOGNITION

- Elite Advisors Group (EAG) is an internal recognition program of Equitable Advisors, LLC.
- Members of the Elite Advisor Group are distinguished, innovative, and respected financial professionals who are highly experienced at addressing the needs of individuals, families and business owners by providing wealth protection, asset allocation, financial and estate planning strategies through a comprehensive range of top-quality investment and financial products from leading financial companies.
- Being part of this team allows Dayton and Sydney to have access to support from a network of professionals in a variety of fields.

FOR MORE INFORMATION



www.daytonandsydney.com



www.facebook.com/daytonandsydneywealthstrategiesgroup



www.linkedin.com/company/daytonandsydneywsg



(631) 385-5319

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CORPORATE SOCIAL RESPONSIBILITY

- For over six years, Dayton and Sydney has come together to volunteer at the “Walk MS”. Over this period they raised over \$50,000 for the cause
- Dayton and Sydney has raised over \$40,000 to benefit the Northport Rotary and make a significant impact in the local community
- Over the years, Dayton and Sydney has donated over \$15,000 to the LGBT Network.

WHAT WE PROVIDE

- Dayton and Sydney currently serves more than 10,000 clients throughout the country.
- They aim to build lasting, long-term relationships with their clients by consistently ensuring an educational, one-on-one experience.
- They provide unique, personalized plans structured on individual personalities.
- Dayton and Sydney implements an innovative approach by working to understand the latest trends and utilizing modern technology to construct new strategies.

WHERE THEY ARE LOCATED

- Headquartered in Woodbury, NY
- Other locations in Fresh Meadows, Manhattan and Boca Raton



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