



## Dayton & Sydney Wealth Strategies Group - Extensive Capabilities

We provide wealth protection, wealth 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.

### Investment<sup>1</sup>

#### ► 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)
- Publicity 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

Securities offered through Equitable Advisors, LLC (NY, NY 212-314-4600), member FINRA/SIPC (Equitable Financial Advisors in MI & TN). Investment advisory products and services offered through Equitable Advisors, LLC, an SEC registered investment advisor. Annuity and insurance products, including those offered by affiliate Equitable Financial Life Insurance Company (NY, NY) and by various unaffiliated carriers, are offered through Equitable Network, LLC. Disability income insurance, long-term care insurance, and health insurance are underwritten by unaffiliated carriers and are offered through Equitable Network, LLC, which conducts business in CA as Equitable Network Insurance Agency of California, LLC, in UT as Equitable Network Insurance Agency of Utah, LLC, in PR as Equitable Network of Puerto Rico, Inc. Dayton and Sydney Wealth Strategies Group is not a registered investment advisor and is not owned or operated by Equitable Advisors or Equitable Network. PPG-156615 (10/20) (Exp. 10/22)

### 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 Agreements<sup>2</sup>

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