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Experience, Education and Community Involvement

I have been working in the financial Services Industry for 10 years and feel the most important role I play is that of an educator. I help clients understand financial planning and try to successfully help them deal with all of their financial goals. These goals range from investment advice on college education, retirement, estate, and insurance planning.

DLG Wealth Management's most important distinction is our independence. We have no relationships that influence our advice other than what is in our client's best interests. Our clients are our number one priority and their financial success is paramount.

It is very rewarding for me to help clients identify needs, view critical issues, and provide comprehensive financial solutions. Most of all I enjoy the people part of my job. Investing fads come and go that's why I feel that DLG Wealth Management has developed a strong investment program focused on quality, discipline and diversification that manage results.