

DLG Website – Our Advisors (Joseph Leo)

Joseph A. Leo
Vice President
Financial Consultant
DLG Wealth Management, LLC.
1705 Genesee St. Suite 1
Utica, NY 13501
(315) 790-5511
jleo@dlgwm.com

Focus Areas Include:

- Retirement planning for both individuals and businesses:
 - Access to a number of 401(k) and 403(b) retirement plan providers
 - Specialize in helping small-business owners understand and utilize both qualified and non-qualified retirement plans
 - Advise self-employed individuals about which retirement options make the most sense for their needs
 - Facilitate Retirement Seminars designed to educate individuals and business owners about all of the different options available to them
- Education savings planning for families
- Estate planning investment strategies

I work with my clients to create custom investment strategies that fit within their risk tolerance profile and are designed to help them meet their financial goals and objectives. I believe in doing business face-to-face and that a strong relationship with my clients is a necessity.