



HERITAGE
A strong family culture

Since our founding in 1980, Dana has remained independent and employee-owned. Our investment firm is built on trust, integrity, and professional experience.

QUALITY
Excellence in meeting client expectations

Dana strives to provide personalized client service and excellence in everything it does. We are uncompromising in our efforts to deliver superior results to clients.

EXPERTISE
Focus on what we do best

Dana has assembled an investment team with diverse skill sets and specialized knowledge. We are adept at navigating challenging market environments and developing customized solutions.

CONSISTENCY
Adherence to a uniform process

Dana implements a uniform investment process to help minimize volatility and improve consistency of returns. We seek repeatable and predictable results to more effectively grow cumulative wealth.

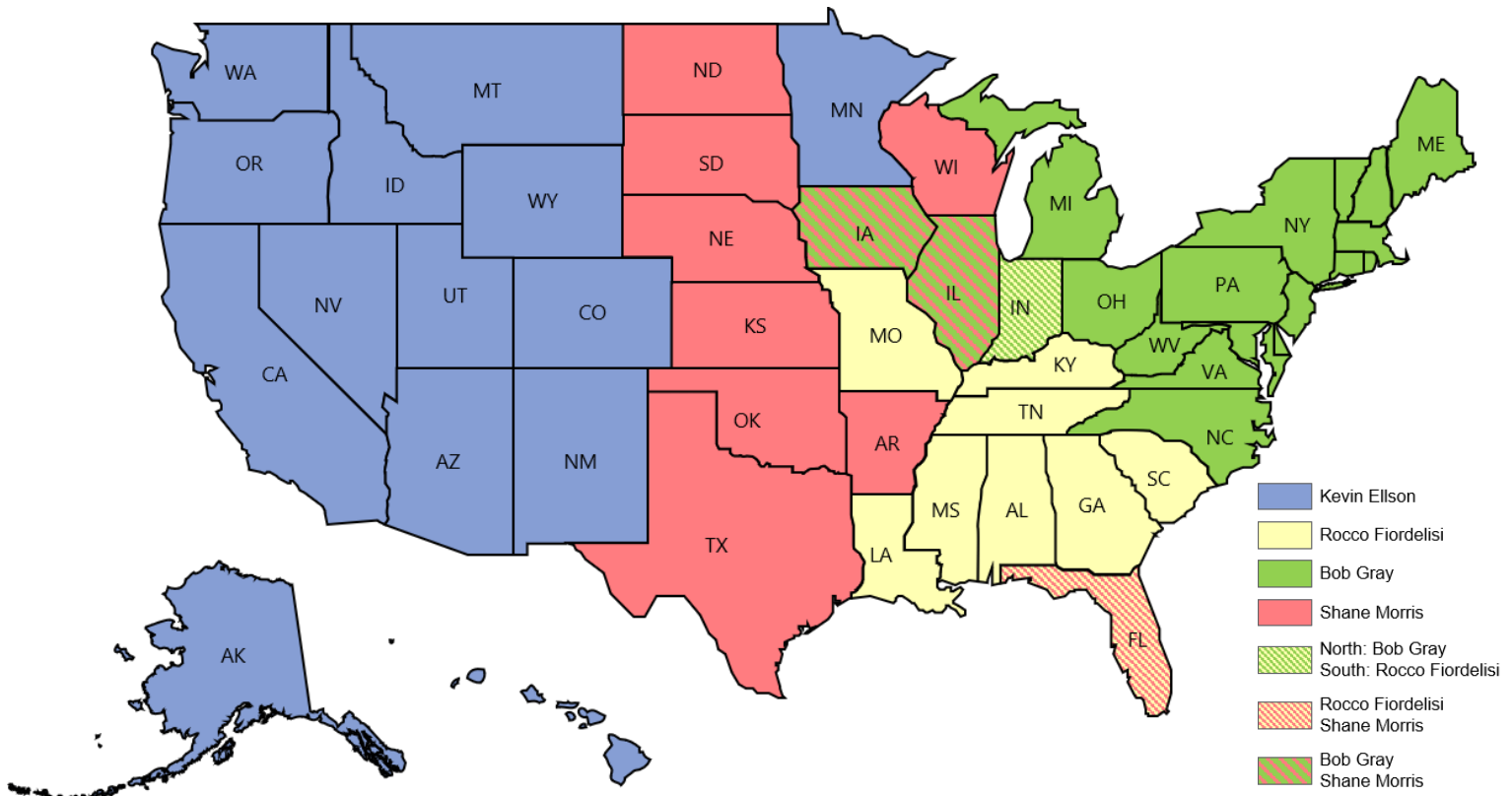
Dana Investment Advisors was built on the belief that adhering to a defined investment process allows our professionals to focus on the fundamentals of consistent outperformance through security selection. Dana is an asset management firm that helps guide clients through an ever-changing market environment while ensuring we listen to them so their needs are taken into account. Our objective is straightforward: Deliver consistent excess returns with lower risk and provide clients with exceptional, personal and timely service. The foundations of our investment process and risk-controlled portfolio construction are similar across the actively managed U.S. equity, fixed income and blended strategies ranging from large to small cap equity, socially responsible, taxable and tax-exempt fixed income strategies.

- **Founded in 1980**
- **Headquartered in Brookfield, Wisconsin**
- **Employee-owned**
- **Domestic equity, taxable and tax-exempt fixed income, and ESG asset manager**



Primerica Lifetime Investment Platform

	Single Account Investment Strategy	Minimum Initial Investment (\$)
Growth Income 	Dana Large Cap Growth Equity	\$50k
	Dana All Cap Equity	\$50k
	Dana Catholic Equity	\$50k
	Dana Social ESG Equity	\$50k
	Dana Large Cap Value Equity	\$50k
	Dana Municipal ETF Bond	\$25k
	Asset Allocation Strategy	Minimum Initial Investment (\$)
	Dana ESG Growth Strategy (80% equity / 20% fixed income)	\$25k
	Dana ESG Moderate Growth Strategy (60% equity / 40% fixed income)	\$25k
	Dana ESG Conservative Growth Strategy (40% equity / 60% fixed income)	\$25k



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