



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 Program

Growth



Income

Growth



Income

Single Account Investment Strategy

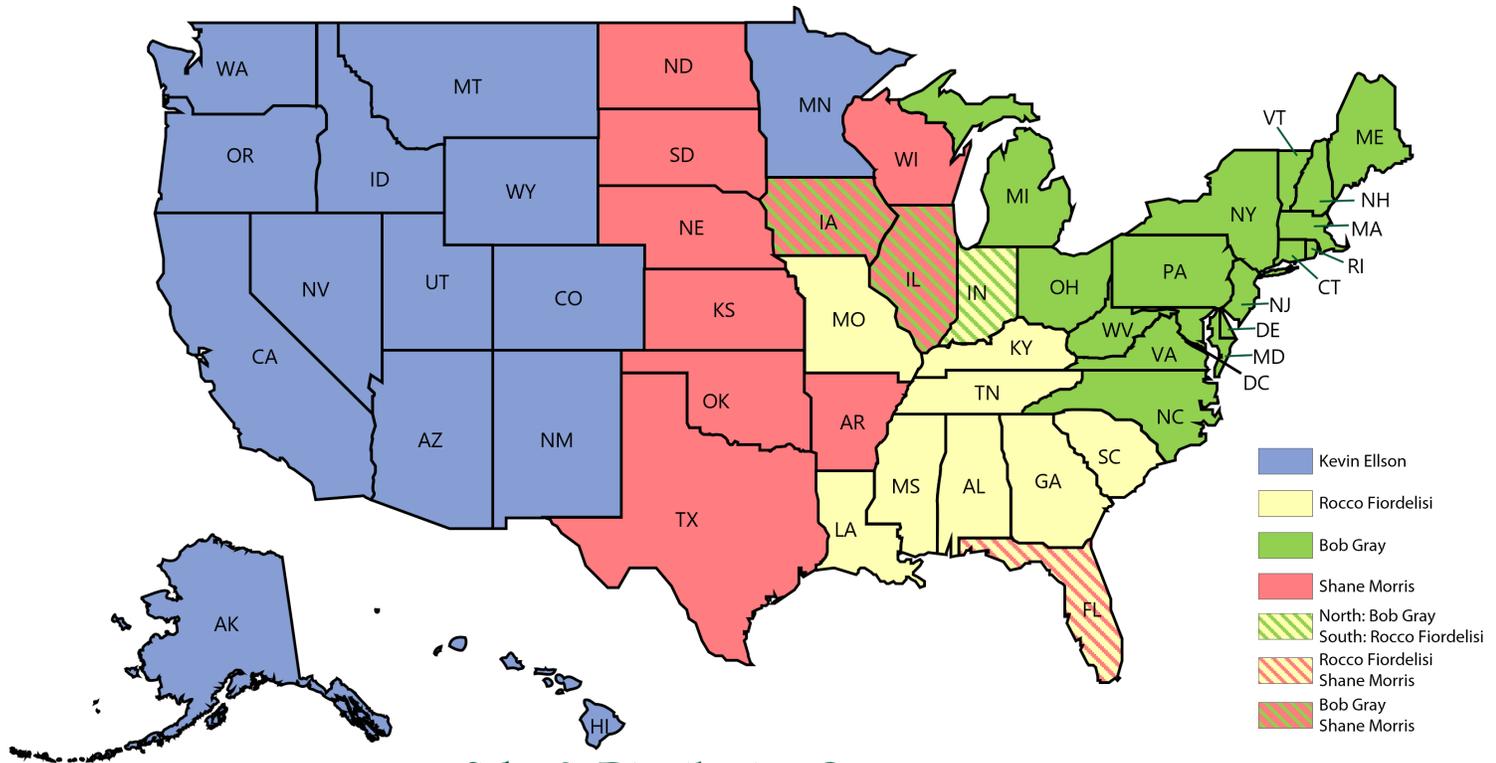
Minimum Initial Investment (\$)

Dana Unconstrained Equity Strategy	\$25k
Dana Large Cap Growth Equity Strategy	\$50k
Dana All Cap Equity Strategy	\$50k
Dana Catholic Equity Strategy	\$50k
Dana Social ESG Equity Strategy	\$50k
Dana Large Cap Value Equity Strategy	\$50k
Dana Concentrated Dividend Equity Strategy	\$25k
Dana Municipal ETF Bond Strategy	\$25k

Asset Allocation Strategy

Minimum Initial Investment (\$)

Dana Growth Strategy (80% equity / 20% fixed income)	\$25k
Dana Moderate Growth Strategy (60% equity / 40% fixed income)	\$25k
Dana Conservative Growth Strategy (40% equity / 60% fixed income)	\$25k



Sales & Distribution Contacts

Kevin Ellson

Platform Coordinator
Cell: 724.659.5114

Kevin@DanalInvestment.com

Alton Wiegley

Portfolio Specialist
Office: 262.782.3631

Alton@DanalInvestment.com

Rocco Fiordelisi

SVP Sales
Office: 314.630.9130

Rocco@DanalInvestment.com

Lucas Ellson

Internal Sales & Advisor Service
Office: 262.201.0737

LucasE@DanalInvestment.com

Bob Gray

SVP Sales
Office: 630.613.7321

Bob@DanalInvestment.com

Matt Mirsberger

Internal Sales & Advisor Service
Office: 262.232.7251

MatthewM@DanalInvestment.com

Shane Morris

VP Sales
Office: 720.201.8496

ShaneM@DanalInvestment.com

Corporate Headquarters

Marketing Support
Office: 800.765.0157