

Reilly Financial Group | David M. Haas



*Investment Advisor Representative
Financial Services Representative*

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About David

David Haas is an Investment Advisor and Financial Services Representative at the Reilly Financial Group, a financial services organization known for its specialized team and the personalized advice and guidance they provide to clients as they build their financial security.

David is dedicated to providing clients with integrated financial solutions and works with individuals, families and business owners as they look to build financial security through every stage of life. As part of a specialized team, he is able to tap into a wide range of planning resources and provide clients with integrated and customized solutions to help them successfully fulfill their financial goals and objectives.

Clients benefit from David's commitment, experience and personal focus. David's ultimate goal is to enrich the quality of his clients' lives by helping them not only achieve their financial goals, but protect their income, family and legacy at every stage of their lives.

Areas of Focus

Retirement Planning: Retirement Planning, Income Continuation, Estate Planning Strategies, Analysis and Selection of Asset Allocation, Individual Retirement Accounts (IRAs), College Funding Strategies

Protection and Insurance: Life Insurance, Fixed and Variable Annuities, Disability Income Insurance Protection, Long-Term Care Insurance, Auto and Home Insurance

Investments: Individual Stocks and Bonds, Mutual Funds/ETFs, Managed Accounts

Business Planning Solutions: Ownership Succession Strategies, Overhead Protection, Key-Person Insurance, Buy-Sell Agreement Funding, Disability Income Insurance

Employee Benefits: Group Life Insurance, Dental Coverage, Disability Income Insurance, Qualified Retirement, Pension & Profit Sharing Plans, 401(k), 403(b), 457(b) and Section 125 Plans, SEP & SIMPLE IRAs

QUALIFICATIONS & PERSONAL INFORMATION:

- Over 15 years experience in the Financial Industry
- Graduated from Mount St. Mary's University with a Bachelor's Degree
- Resident of Maplewood, NJ with his wife Janine and daughter Cecilia

LICENSING INFORMATION:

Security registered: NJ, NY

Life and Health Insurance, Variable Annuity: NJ, NY, PA

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