



**CERTIFIED FINANCIAL PLANNER™ professional**  
**Financial Services Executive**

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## About Denis

Denis is a Certified Financial Planner, Accredited Investment Fiduciary and Financial Services Executive at the Reilly Financial Group, a Financial Service Organization known for its specialized team and personalized advice they provide to clients as they build their financial security. The team was named PCG Team of the Year in 2015 for the work they do with clients and within their team.

Denis's background, experience and commitment to providing resources needed to help clients make knowledgeable decisions regarding building and protecting wealth, can help make your financial future as successful as you need it to be. Denis prides himself on getting to know each client so that he can understand their individual needs and what matters most to them.

## Areas of Focus

- Wealth Management
- Risk Management
- Estate Planning
- Financial Planning
- Protection & Insurance
- Retirement Planning
- Investment Services
- Business Planning Solutions
- Employee Benefits

## EDUCATION:

- University of Richmond, B.S. Business Administration, Concentration in Accounting
- Certified Financial Planner, American College
- Accredited Investment Fiduciary, fi360 Center for Fiduciary Studies

## PROFESSIONAL & COMMUNITY ASSOCIATIONS:

- Financial Planning Association
- Society of Financial Service Professionals

## LICENSING INFORMATION:

FINRA Series 7, 66 & 31

Security registered: CA, CO, FL, MA, NC, NJ, NY, PA

Life and Health Insurance, Variable Annuity: FL, MA, NC, NJ, PA, TX