

DANA TRACY

*Regional Director of Sales and Marketing,
Florida*



INTRO

Dana aims to help financial advisors in primarily in the state of Florida achieve their clients' retirement goals using her expertise in the qualified plan industry.

Dana brings over 15 years experience working in retirement plan sales and service. She considers one of the most rewarding aspects of her work to be the opportunity to build meaningful relationships and enable business owners create successful retirement plans for their employees.

Dana works with financial advisors, CPAs and other industry partners to ensure clients' needs are being met. She is committed to helping business owners maximize tax savings while creating retirement benefits that help them recruit and retain a talented workforce. Each client is unique in their needs and Dana enjoys the challenge in finding the right solution for each situation.

The team at **ERISA Services** is dedicated to the success and well-being of your retirement plan. Through your relationship with our consultants and relationship managers, we will work with you to understand your company, your employees and your employee benefit plan's objectives. We will tailor fit a design for you to achieve these goals as each client has different objectives for their retirement plan.

ABOUT DANA:

Dana began her retirement plan career in beautiful, sunny South Florida, where she spent 12 years honing her skills and making lasting connections. After over a decade in the sunshine state, she relocated to Georgia with her husband and son, embracing a new chapter of life, while still being able to serve the relationships she created while she was in Florida. When not at work, Dana loves spending time with her family, running and cycling, DIY home projects, reading and cheering for the Florida Gators!

FOCUS:

To build relationships with financial professionals, and local CPAs, partnering to identify the best retirement plan solutions for their clients.

To increase awareness of ERISA Services' offerings and solutions, and to be a resource for clients, advisors, and CPAs providing strategies which are the best fit to their needs.

To be consistent in her results driven approach and message of reliability, honesty, and enthusiasm with the people she serves.

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***Guide me in your truth and teach
me, for you are God my Savior, and
my hope is in your all day long
Psalm 25:5***

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Services

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