



Dan Bernabe
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MY BACKGROUND

I was born in Morristown, NJ, but my family moved to NC when I was a young boy. I grew up near Elkin, NC and graduated from Surry Central High School. I earned my degree from The University of North Carolina at Greensboro in 1993 with a BA in Pre-Law. I spent 12 years in the financial services industry and earned my way to vice president in a Fortune 500 Company for whom I worked. I have been a financial advisor for 13 years, the last seven of which have been with Allegacy. I now live in Midway, NC and have for the past 13 years with my wife, Amy, and my two children, Daniel, 11, and Mia, 9.

HOW I PRIORITIZE MY WELLNESS

My wellness is grounded in my family, so spending time with them is my priority. We especially enjoy spending time outdoors. Whether it be hiking, biking or paddling, we enjoy nature and the healing effects it affords us. With our hectic day-to-day schedules, we find it to be rejuvenating and relaxing at the same time. Staying active is important to us, so the kids also participate in various sports and I volunteer as a coach in our community.

WHY I BECAME A FINANCIAL ADVISOR

I have always been a natural teacher. I found that the industry needed more advisors willing to *teach* their clients how to save, invest and plan for the future, rather than telling them what to do. And when a family member passed away and neglected to do the proper planning, I saw how difficult that was on the family. I committed myself then to doing something that can really help people and make a dramatic impact in their lives. I have found that being a financial advisor gives me the best avenue to do just that.

WHY I CHOSE ALLEGACY

I had been advisor at another firm before I came to Allegacy. I found that firm to not be committed to truly helping people. When I entertained moving to a new firm, I found that everyone I met who had a relationship with Allegacy to be complimentary of every level of service they encountered, something I cannot say is true of most financial institutions. I knew that Allegacy must be doing something right and I wanted to be part of that culture. Since my first day I have worked hard to uphold that tradition and continue those values.