Janney

1776 CAPITAL MANAGEMENT GROUP

OF JANNEY MONTGOMERY SCOTT LLC

Embrace Financial Independence

A TOPIC-FOCUSED APPROACH TO ADVICE

At 1776 Capital Management Group, we help individuals, families, business owners, and institutions bring clarity and confidence to complex financial decisions. Through personalized planning, disciplined investment management, tax-aware strategies, and ongoing guidance, we help clients preserve, manage, and transfer wealth while staying focused on what matters most: pursuing and sustaining financial independence.

Our founder, Dan Levin, is a member of Janney's CEO Roundtable and has been recognized by **Forbes as a Best-in-State Wealth Advisor (2021, 2022, 2024, 2025 , 2026). Holding the prestigious CIMA® and CPWA® certifications, Dan is dedicated to helping a select group of private clients, businesses, and institutions navigate the complexities of wealth management.

We focus on:

- Customized financial solutions tailored to your goals, long-term growth, stability, and financial success.
- Efficient tax management & asset protection strategies to limit tax liabilities and help secure your wealth.
- Wealth transfer planning to help you preserve and transfer wealth across generations with minimal disruption.
- Educational workshops that empower clients and their professional advisors. We are approved by the state of Pennsylvania to offer Continuing Professional Education (CPE) credits for CPAs.

Whether you're an individual aiming for a work-optional lifestyle, an endowment looking to optimize returns, or a retirement planner seeking effective solutions, we provide exceptional investment consulting services.

Our Advisory Services Process: If you elect to engage in our advisory services, we can provide advice and strategies for each stage of your financial journey.

STARTING OUT

MANAGING MY HOUSEHOLD FINANCES

GROWING MY WEALTH

NEARING RETIREMENT

LIVING IN RETIREMENT

** For a detailed description of Advisory programs' services and fees, refer to the Janney Form ADV Part 2 disclosure document, available upon request and online at www.janney.com.*

MEET THE TEAM

DANIEL LEVIN, CIMA®, CPWA® | Executive Vice President / Wealth Management, Financial Advisor
215.619.3923 | dlevin@janney.com | LinkedIn

Dan has been serving private clients, businesses, and institutions since 1992 and is the co-founder and Executive Vice President of 1776 Capital Management Group at Janney Montgomery Scott LLC. He is a member of Janney's CEO Roundtable and has been recognized by Forbes as a Best-In-State Wealth Advisor five times, most recently in 2026.

Dan earned the Certified Investment Management Analyst® (CIMA®) designation after completing the educational requirements at the University of Pennsylvania's Wharton School of Business, as well as the Certified Private Wealth Advisor® (CPWA®) designation through the University of Chicago Booth School of Business. In addition to holding all applicable securities registrations, insurance, and commodities licenses, Dan earned a bachelor's degree from the University of Richmond in Virginia. He is also certified by the Commonwealth of Pennsylvania to provide continuing education credits to CPAs.

Giving back to the community where he lives and works is extremely important to Dan. He remains actively involved with Fox Chase Cancer Center and is a member of both the Fox Chase Cancer Center Board of Associates and its Bucks County Chapter. He is a past president of both organizations and continues to support their mission of advancing cancer research and patient care.

Dan and the 1776 Capital Management Group team are committed to supporting worthy causes throughout the community, including cancer research and educational opportunities. Dan is an Ambassador for the J. Wood Platt Caddie Scholarship Trust and serves on the Board of Governors of the Philadelphia Cricket Club.

Dan is also passionate about mentoring the next generation of financial professionals. Since he began his career, he and his team have regularly hosted college interns each summer through the team's internship program, providing students interested in wealth management with meaningful exposure to the profession and guidance as they consider their career paths.

Dan grew up in Bucks County and has lived in Blue Bell with his family for 30 years. He and his wife, Laura, a registered nurse, have three young adult children: Clare, Danny, and Alex. In his free time, Dan enjoys swimming, golf, reading, and travel.

CAROLINE SALVATI | Private Client Associate | 215.619.4509 | csalvati@janney.com

Caroline commenced her professional journey at Murphy Quigley Company, where she immersed herself in Project Management, working on projects spanning both union and non-union domains within the construction sector. After two years, her vocational compass steered towards the realm of finance. Embracing her non-traditional path into the industry, she embraces the opportunity to contribute her knowledge and experience to the 1776 Capital Management Group.

Caroline was attracted to Janney by its industry thought-leaders and its client-focused philosophy. She enjoys acquiring industry-specific knowledge and collaborating with seasoned professionals in the field. Central to her approach is a commitment to deriving enjoyment from every task and creating meaningful connections with clients. In her free time, Caroline gravitates towards the gym and hiking. She is an avid reader, enjoying the works of Leo Tolstoy and Emily Bronte. Outside of the office, Caroline's favorite place to be is Brigantine with her close friends.

OUR PHILOSOPHY & PROCESS

HOW WE WORK WITH CLIENTS

At the heart of our approach is a focus on what truly matters: our clients and the factors within our control. We offer personalized services and solutions designed to align with your unique needs while helping you move towards financial independence. By cutting through the noise of daily headlines and distractions, we can stay focuses on your financial well-being.

Our financial planning revolves around these key steps:

- Gaining a deep understanding of your individual circumstances.
- Evaluating how different economic scenarios may affect your financial picture.
- Providing clear, direct communication, without exception.
- Prioritizing investments that generate cash flow (through dividends and interest) to support potential income needs while improving return consistency.
- Eliminating unnecessary fees from the investment process and ensuring all costs remain fair and transparent.




OUR SUMMER INTERNSHIP PROGRAM

Each year we welcome a new set of interns from various universities. Our practice continues to benefit from their fresh perspectives, ideas, and curiosity. Over the years, we have worked with students from the University of Pennsylvania, the University of Richmond and Villanova University. Our summer internship immerses college students in the dynamic realm of finance, offering firsthand experience of the business's day-to-day operations. Over the summer our interns gain practical, real-world experience that serves as a compass for navigating future career aspirations – empowering them to make informed decisions about their professional trajectory.

EMBRACE FINANCIAL INDEPENDENCE

1776 Capital Management Group provides individuals, families, and businesses with comprehensive consulting services related to wealth preservation and growth, estate planning and retirement planning.

We strive to achieve lasting client relationships that result from our financial planning process supported by state-of-the-art resources, and our highly knowledgeable team members. 1776 Capital Management Group is rooted in the Philadelphia region and is dedicated to serving the best interests of our clients. We offer a wide variety of services to help secure each client's financial well-being.

Comprehensive Wealth Planning

- Personalized financial plans and strategies
- Tax management and asset protection strategies
- Executive services, cash-flow, retirement, and life insurance planning
- Partnership with your legal and tax advisors

Institutional Consulting Services*

- Open architecture and access to exclusive investment products and managers
- Behavioral financial guidance and investment management consulting
- Risk management strategy that targets each client's goals while minimizing risk

Team Intellectual Capital

- Connection to C-level professional network
- Access to concierge services
- Advanced professional designations earned through top business schools

1776 Capital Management Group of Janney Montgomery Scott is committed to helping our clients achieve their financial goals, and helping clients achieve financial independence.

OUR PROCESS

DISCOVERY PROCESS
Identifying your goals, values, concerns, and what is important to you

FINANCIAL PLANNING DATA COLLECTION:
Meeting to learn necessary information to complete a financial plan

FINANCIAL PLAN IMPLEMENTATION
After agreeing to a plan, we execute the plan and apply appropriate investment strategies based on the goals you have set

PERIODIC REVIEWS
Regularly revisit the plan and make updates as necessary

APPROPRIATE ADVICE TO HELP YOU REACH SPECIFIC GOALS

WEALTH MANAGEMENT
Tailored strategies to preserve, grow, and transfer wealth across generations. This includes asset allocation, risk management, and investment strategies, with a focus on meeting long-term financial goals.

INVESTMENT STRATEGY & PORTFOLIO MANAGEMENT
Custom investment plans based on clients' financial objectives, risk tolerance, and time horizon. This includes a mix of equities, fixed income, alternative investments, and tax-efficient strategies.

ESTATE PLANNING
Comprehensive estate planning services to ensure wealth is passed on efficiently, including the use of trusts, wills, tax strategies, and charitable giving to minimize estate taxes and provide for heirs.

TAX OPTIMIZATION & PLANNING
Strategic tax planning to minimize tax liabilities and maximize after-tax returns, utilizing advanced techniques like tax-deferred growth, tax-loss harvesting, and the structure of income sources.

RETIREMENT PLANNING
Customized retirement strategies that help clients achieve financial independence, including developing income streams and managing risks associated with retirement, longevity, and healthcare costs.

PHILANTHROPIC & CHARITABLE GIVING ADVISORY
Guidance on structuring charitable donations and setting up philanthropic vehicles such as donor-advised funds (DAFs), charitable trusts, or foundations, with an eye on maximizing impact and tax benefits.

RISK MANAGEMENT & INSURANCE PLANNING
Tailored risk management solutions, including insurance strategies (life, disability, long-term care), to protect against unforeseen events and ensure financial stability for clients and their families.

CASH MANAGEMENT
Full-spectrum of institutional money market funds, Treasury Bills and Notes, as well as CDs.

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ABOUT JANNEY MONTGOMERY SCOTT LLC

With roots tracing back to 1832, the Financial Advisors of Janney Montgomery Scott LLC have continued to build their reputation for providing timely service and knowledgeable financial consultation to individual and institutional clients.

Janney Montgomery Scott LLC is an integral part of the nation's financial history, having held the second oldest membership on the New York Stock Exchange. Through this unique perspective, we have seen our industry—and our clients—evolve. We have adapted to meet the challenges presented by change while adhering to the core principles of our founders—and our client commitment: service, trust and integrity. We rank as a top-tier, full-range firm, providing financial services, investment banking and municipal and public finance services. Our primary business, however, is helping individuals and their families grow, manage, protect and transfer their wealth.

For more information about Janney, please see Janney's Relationship Summary (Form CRS) on www.janney.com/crs which details all material facts about the scope and terms of our relationship with you and any potential conflicts of interest.

IMPORTANT DISCLOSURES

Your Relationship With Janney

Depending on your financial needs and personal preferences, as well as the fees and costs associated with those services, you may opt to engage in a brokerage relationship, an advisory relationship or a combination of both. Each time you open an account, we will make recommendations on which type of relationship is in your best interest based on the information you provide when you complete or update your client profile.

If you engage in a brokerage relationship, you will buy and sell securities on a transaction basis and pay a commission for these services. Our recommendations for the purchase and sale of securities will be based on what is in your best interest and reflect reasonably available alternatives at that time.
If you engage in an advisory relationship, you will pay an asset-based fee which encompasses, among other things, a defined investment strategy, periodic review, and performance reporting. We will serve in a fiduciary capacity for your advisory relationships.

Awards and Recognitions

Reference to any award, accolade, or third-party rating received by Janney Montgomery Scott LLC ("Janney", "the Firm") or an employee of Janney herein do not constitute a guarantee of future investment success, nor does an award, accolade, or third-party rating imply any specific level of skill or performance in relation to services provided through the Firm. The selection process for this award is based on certain criteria determined by the awarding entity, which may differ from those of other awards, and may not necessarily reflect a Financial Advisor's overall performance or individual qualifications. This recognition should not be considered as an endorsement or guarantee of any Financial Advisor. As with any financial planning or investment advice, past performance is not indicative of future results, and investors should carefully consider their personal financial goals and risk tolerance before making decisions. For more information about any awards referenced, including relevant criteria, please visit Janney.com/award-disclosures or contact your Financial Advisor.