



# **D.A.C. Investment Partners**

**of Janney Montgomery Scott LLC**



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## MEET THE TEAM

D.A.C. Investment Partners have been working with high-net-worth individuals, families, charitable organizations, and businesses for several years. We are dedicated to developing lasting relationships with all our clients. We believe in helping you assess your financial goals and participate in the management of your wealth. One of the benefits of working with us is our ability to provide clear, easily understood explanations of financial investments and services. The personalized program that we can recommend is a roadmap to working towards your financial goals and objectives. We're looking forward to using our experience to help you pursue your financial goals.

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### **PEYTON T. WYLIE**

**First Vice President / Wealth Management, Financial Advisor**  
**904.280.5559 | [pwylie@janney.com](mailto:pwylie@janney.com)**

Following his arrival to Janney Montgomery Scott, LLC. in 2008, Peyton and Donald Cavalcanto, officially joined forces to create D.A.C. Investment Partners in 2010. The partnership was founded to ensure that clients only receive the highest quality of service and advice. After sixteen years of working together, Don retired in the summer of 2024. The objective of D.A.C. Investment Partners at its creation and today is to aid in the growth and protection of clients' wealth from generation to generation. Peyton and his staff are devoted to affording his clients with a legacy of accomplishment through a strong relationship built on trust and achievement.

Prior to joining Janney, Peyton worked at J.P. McGowan and Company Inc., splitting his time between the Municipal Bond Trading Desk and Municipal Underwriters. While with J.P. McGowan, he worked closely with some of the world's most talented municipal finance underwriters and did research associated with several large municipal offerings, both at the local and national level. Peyton graduated with a Bachelor of Science in the field of Finance from the Alfred Lerner College of Business and Economics at the University of Delaware. He currently has his FINRA Series 7, 63, and 66 licenses as well as health and life insurance licenses.

In his free time, Peyton enjoys spending time with his friends and family, volunteering with charitable organizations, sailing, biking, and golfing. He is a member of the Union League of Philadelphia, the Cheshire Hunt Conservancy, and the Golf Club of Amelia Island. Peyton, his wife Sara, and their two children primarily reside in Amelia Island, Florida.

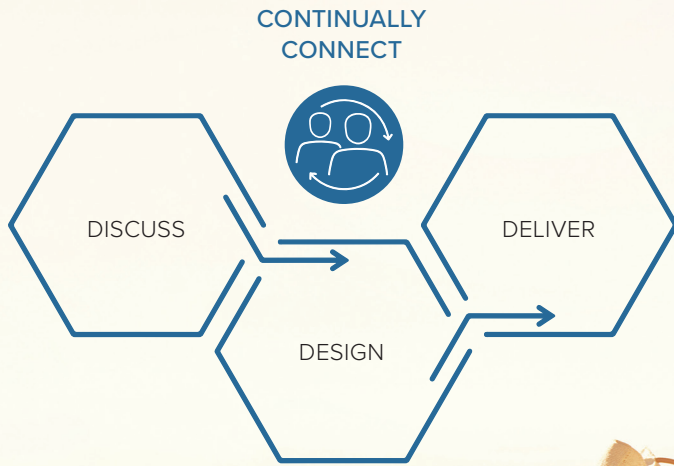


### **MEG WRIGHT**

**Registered Private Client Associate**  
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Meg joined D.A.C. Investment Partners of Janney Montgomery Scott LLC in 2026. She brings a diverse professional background shaped by both financial services and education. Before joining the team, she worked at Equitable Advisors and Fidelity Investments, where she gained experience in client service, financial operations, and relationship management. While working at Fidelity she became registered by obtaining her FINRA Series 7, Series 63, and Series 66 licenses, which have strengthened her understanding of investment products and regulatory requirements. Prior to her work in finance, Meg spent 23 years as a teacher, developing strong communication skills and a talent for helping people navigate complex information.

Outside of work, Meg enjoys traveling and exploring new places with her husband, David, as well as knitting, which gives her a creative and relaxing outlet. She is excited to bring this blend of experience and enthusiasm to her new role and contribute to the team's success.



## OUR PROCESS

### CONTINUALLY CONNECTING YOUR LIFE AND FINANCES

Your financial life is constantly in flux. Career and family changes, windfalls or unexpected expenses, economic events, and health issues may all necessitate modifying and updating your plans and your investments over time. Peyton periodically reviews your goals and circumstances, so your investments and other financial decisions can adapt to your changing reality and keep you on track.

**DISCUSS:** A financial planning process should adapt to you, not the other way around. Peyton will begin by sitting down and listening—to learn more about your goals and dreams, your challenges and concerns, and your financial attitudes, behaviors, and current financial situation. He will then ask questions and gather information that will enable us to address both today’s needs and tomorrow’s goals.

**DESIGN:** Using our innovative financial planning software and tools, and by collaborating with Janney’s investment, risk, and financial planning specialists, Peyton will analyze different scenarios and create a path forward for you. Your financial plan looks at your complete picture and considers how to make your assets work together in a coordinated way. Together, they can thoroughly review your options, discuss your preferences and concerns, and explore the potential impact of the proposed actions on the likelihood of achieving your goals.

**DELIVER:** When you are ready, Peyton can then use your financial plan as a blueprint to make specific investment and other recommendations that he can implement. Once your plan has been implemented, Peyton can periodically check in on your progress towards goals and consider any changes that might need to be addressed to keep you on track. Through our holistic approach, he can help you address multiple goals simultaneously through one fluid plan, addressing some or all of the following connection points. And, because of our belief that ongoing planning—not just a one-time plan—is essential, he can help adjust your plan as your needs and goals evolve.



#### D.A.C. INVESTMENT PARTNERS

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## CONNECTION POINTS

There's more to managing wealth than just investments. Peyton can help connect your life and goals by implementing strategies and solutions that align with your unique needs and preferences.

### INVESTING

Establishing and maintaining a long-term investment strategy is critical to achieving your goals. Peyton can create an investing road map to help you reach them.

### ASSET PROTECTION

Managing risk isn't just a portfolio concern, it's about protecting your family's lifestyle, your assets, and your legacy. Our income and asset protection solutions encompass personal insurance, business insurance, and long-term care.

### EDUCATION

As college costs continue to rise, providing for your child's or grandchild's education requires discipline. Peyton can help you find a solution to fit your circumstances—such as 529 plans, Coverdell education savings accounts, or UGMA/UTMA accounts.

### RETIREMENT PLANNING

Will your retirement savings last a lifetime and provide for all you've envisioned? Peyton can help you consider retirement strategies such as generating retirement income with your investments, Traditional, Roth, Rollover, Simple, and SEP IRAs, and/or annuities.

### CASH FLOW, BUDGETING & LENDING

Building wealth and maintaining liquidity don't always go hand in hand. Peyton can help you balance both goals with budgeting, cash flow management, credit card solutions, and portfolio-backed lending, as well as residential real estate and unsecured loan opportunities.

### BUSINESS PLANNING

If you own a business, Peyton can help you get your professional and personal lives working harmoniously with business retirement plans, business succession planning, executive compensation, and benefits optimization.

### ESTATE PLANNING

A secure future for your heirs requires stability, protection, and continuity. Peyton can help you tax-efficiently transfer assets using personal trusts, insurance, and special needs trusts.

### PHILANTHROPIC GIVING

Peyton can help you make a greater impact and get more fulfillment from your charitable efforts by considering donor advised funds, charitable trusts, and various gifting strategies.

\* 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](http://www.janney.com).



## ACCESS AND CHOICE

**As a part of a full-service firm, D.A.C. Investment Partners can provide access to everything you need to best execute your financial plan.**

Our size makes us approachable, accessible, and accountable. Whether you have questions regarding your financial plan, advisory and brokerage services, investment strategies, and more, we are committed to serving and responding to your needs.

You want to feel confident that the wealth management firm you choose will be there over the long run to support your financial goals, in every market condition, through every stage of your life.

### **OUR FIDUCIARY DUTY**

The fiduciary standard is a legal requirement that Janney and its Financial Advisors are bound by when offering advisory services—to always act in your best interest with respect to the investment advice and services we provide. It requires a commitment to always put your interests ahead of ours and provide full and fair disclosure of all material facts relating to our advisory relationship, including conflicts of interest.

## **SOLUTIONS FOR YOUR BUSINESS**

Peyton can also provide additional services for your business, such as corporate retirement plans and investment banking services.

### **Corporate Retirement Plans**

- 401(k)
- 403(b)
- Profit Sharing
- Traditional Defined Benefit or Cash Balance
- 457
- Non-Qualified Deferred Compensation
- SIMPLE and SEP Plans

### **Investment Banking Services**

- Equity Capital Markets
- Debt Capital Markets
- Mergers and Acquisitions
- Restructuring
- Business Succession Planning

### **Financial Planning for Businesses**



## 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. Our core principle is helping individuals and their families grow, manage, protect and transfer their wealth.

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### 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.

For more information about Janney, please see Janney's Relationship Summary (Form CRS) on [www.janney.com/crs](http://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.

#### 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](http://Janney.com/award-disclosures) or contact your Financial Advisor.