About Phil

Phil began his career in the investment industry in 1995. He has spent his 17 year career serving the needs of individual investors and small businesses both on Long Island and in Queens, New York. Before starting his own firm, Phil was most recently with a brokerage firm for 13 years. There were 200 families in his practice with assets of over 300 million dollars. He has delivered hundreds of investor workshops and seminars on a variety of investment and financial planning topics and has been interviewed by the Wall Street Journal, CNBC.com, Smart Money Magazine and the USA Radio Network.

An Independent Relationship for the Long Term

After the financial collapse of 2008, where Wall Street investment firms sustained huge financial losses, many firms have decided to move away from customized, personal, face-to-face relationships with clients, choosing a more scalable, profitable, cookie-cutter approach to their advisory services. As a result, Phil decided to break away from the Wall Street model and follow his passion for building relationships and de-mystifying the investment process for individual investors.

Creation of DPS was formed with the guiding principles of:

- Establishing long-term relationships based on mutual respect, trust and friendship
- Honest transparent and open communication
- Serving clients with integrity
- Highly responsive, professional first class service
- Unbiased, expert and timely advice
- Steadfast dedication to our belief that “clients’ interests always come first”

Phil and his wife Suzanne have been married for 26 years and have three children. They have lived in Commack, New York since 1989 and are very active in their community. Phil enjoys volunteering his time coaching in various youth sports organizations and playing golf with his sons.

Ask A Financial Advisor
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