

TREG A. LEWIS

WEALTH ADVISOR

Treg is responsible for providing financial solutions for individuals, businesses and employee benefit plans. His goal is to help clients enjoy the confidence that results from identifying what matters most to them, create strategies that align with their values and help them leave a legacy for future generations. He enjoys educating clients so they can be confident in the financial decisions they make in pursuit of their goals. He holds his North American Securities Administrators Association (NASSA) Series 65 License and is registered as an Investment Adviser Representative.

Treg built and developed an exemplary professional career prior to joining Dopkins. He most recently served as the Vice President at BBX, Inc., a major logistics company based in Western New York with operations across the United States and Canada. In this capacity, he excelled at solving complex business problems and was responsible for the management and strategic direction of multiple company locations totaling over 180 employees. He has developed a deep understanding of operations within various industries, including automotive, agribusiness, dairy, grocery, manufacturing, and warehousing, with a specific focus on family-owned businesses. Prior to his career in supply chain, Treg worked in New York City helping financial institutions and consultancies effectively communicate services to their target markets. He has consistently found success working with team members and clients through his effective communication skills and unique ability to navigate the granular details and operational nuances of businesses in various sectors. Through his tireless work to expand his leadership and strategic planning experience, Treg has developed a deep understanding of the challenges business leaders face and is well-suited to helping them developing a personalized plan that promotes long-term success.



CONTACT

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EDUCATION

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