

# Gregory Mark Allen

Greg Allen was born in Quantico, Virginia. He played youth sports and excelled in baseball. He graduated from Hinton High School in 1966 and was Vice-President of his Class. He attended Concord College and graduated in 1970 with a Business Administration degree with an Economics Emphasis. During his time at Concord, he was President of the Pi Kappa Alpha fraternity.

Greg is the founding partner of Disciplined Advisors Group (DAG). At DAG, he oversaw client accounts and client development, cultivating relationships and staying active in the community. He quoted, “A boutique money management firm that offers financial services to individuals. We are an independent advisory group with no ties to a giant corporate parent. Our entire focus is on developing and managing a comprehensive common sense financial strategy that meets our clients’ unique needs both for income and growth.”

Allen’s career in the financial industry began in 1972 with Merrill Lynch. Five years later, he started as a financial advisor with Morgan Stanley Dean Witter (now Morgan Stanley) where he spent 25 years working as a branch manager in Santa Fe, Oklahoma City, and Chicago, and then was promoted to Regional Director for Morgan Stanley’s Southwest division in Dallas in 1995. Greg has been a Certified Financial Planner, CFP®, since 1984. Allen then served as the National Sales Director for Bank of America Investment Services in 2003, before entering retirement and then coming out of it to start DAG. His partners now continue to run that firm.

Prior to his career in the financial industry, Allen served in the New Mexico Air National Guard, the Texas National Guard, and the Oklahoma National Guard. Allen has also played an active role in the community throughout his professional career. Currently, he is an active member of Cordillera Motorcycle Club in Colorado. With the Cordillera Motorcycle Club, Allen supports youth education with financial and materials donations and volunteering. He has been on the board of directors for Make-A-Wish Foundation N. Texas, board of trustees for Cordillera Motorcycle Club, board of trustees for The Concord University Foundation, and in 2022 was awarded a Doctor of Humanities, Honoris Causa. He has served as a youth mentor in Plano, Texas. Additionally, Allen has taught classes in economics/investments for the University of New Mexico, Los Alamos branch, and taught financial planning at the College of Financial Planning in Oklahoma City. He has also been a guest speaker at his alma mater, Concord University, West Virginia.

Allen is an avid traveler. He and his Wife, Lorraine, have a son, Zach, who lives in Dallas, TX, and a daughter, Veronica, who lives outside New York City. He currently resides in Vail Valley, CO.

**Gregory Mark Allen**

**We Salute You!**



Hinton Little League Reds Baseball Team – 1961

