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Steve has over 30 years of experience in the financial services industry. He has worked for two trust companies and held various positions in the insurance industry including: multi-line agent, Director of Advanced Markets, and Senior Counsel for Compliance.

His areas of specialty include estate planning, business succession, and IRA/annuity distribution options.

Steve believes that the most important element in the financial planning process is starting with what the client wants and understanding their unique situation.

Here when you need us

When you encounter a complex case, call your Nationwide® wholesaler or contact the Advanced Consulting Group for assistance.

National Sales Desk: 1-800-321-6064

Nationwide Financial Network®: 1-877-223-0795

Brokerage General Agents (BGAs): 1-888-767-7373

Option 9, extension: 677-6500

While we are able to assist you with advanced financial planning strategies, Nationwide and its representatives do not give legal or tax advice. Please have your clients contact their legal or tax advisor for answers to their specific questions.



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