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***“Passion is energy. Feel the power that comes from***

***focusing on what excites you.”*** – Oprah Winfrey

Coming from humble beginnings, Stephen is familiar with the common feeling of anxiety surrounding money. As a young father, he grew up fast and was committed to gaining financial security, stability, and career progression to care for his family.

He was raised in a loving family, by matriarch who was the constant and served as the foundation upon which the entire family is built. She was admired, well respected, and taught him the importance of hard work, dedication, and loyalty.

He adheres to his core values and beliefs:

* Have integrity, through honest behavior and approach.
* Be known for kindness, grace, positive words, and actions.
* Help others, without expecting anything in return.
* Be humble. Do good for everyone involved.
* Generous, selfless, and give time, money, and talent.

He has almost three decades of business experience in the legal, real estate, private equity, investment banking and financial services industries which has resulted in a wealth of knowledge and insight. Couple this with his academic accolades and you get a skilled professional who will impact your life positively.

* Bachelor of Science (M.S.) in Finance, Rutgers University
* Juris Doctor degree (J.D.), Stanford University

Stephen feels that if you do right by others, success will follow. He now lives by the mantra that “faith meets intellect, leadership meets service, ideas meet action, and purpose meets practice”. His academic achievements have better prepared him for a greater purpose in life.

***“Intelligence plus character – that is the goal of true education.” -*** Martin Luther King, Jr.

In a world where hustle, bustle, and hyper-productivity was valued, Stephen sacrificed personal time, his health and family needs for professional success. As such, he was struggling to find balance. Sitting in his corner office, overlooking the New York skyline, Stephen recognized he was not living a fulfilling life or achieving his full potential. This was further exacerbated when his mother died, prior to enjoying her retirement dreams.

At that moment, he realized money was not as important as other aspects of his life. Although his finance profession held prestige and provided prosperity, he yearned to pursue those things that really mattered in life and would provide an intersection of first his purpose, then passion, and finally profit. He then made a conscious decision to shift careers and focus on experiences, relationships, and adventure -- to live life to its fullest and positively impact others. He transitioned to the next phase of his life, leveraging his expertise and compassion to pursue a more fulfilling career.

Stephen has built a thriving financial services practice where he serves as a role model, leading new financial professionals to increased efficiency, effectiveness, and profitability. He also acts as a change agent for the organization, creating a culture of diversity, inclusion, and equity. These actions align with his life ambitions.

***“A life not lived for others is not a life.” -*** Mother Teresa

Stephen empowers others to make informed financial decisions, and take charge of their future to accomplish dreams, goals, and aspirations. He develops lifelong client relationships by;

* Assessing their savings, investment and protection needs.
* Charting a course toward financial independence.
* Offering a broad menu of competitive investment products.
* Providing ongoing advice and education.
* Communicating clearly and effectively, with simplicity.
* Adjusting clients’ financial strategies for life events.

As an entrepreneur, Stephen has a deep understanding of the market and customizes financial services and solutions for individual client needs. He takes a comprehensive, holistic, and consultative planning approach when providing advice on estate, retirement, tax, investment, and protection planning strategies.

Stephen is a recognized thought leader, an in-demand speaker, and a contributor to numerous publications including Yahoo Finance, USA Today, Kiplinger, and WealthManagement.com. He also serves as an advocate for industry and community organizations including;

* American & National Dental Associations (ADA & NDA)

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* Russell Innovation Center for Entrepreneurs (RICE)
* Georgia Minority Supplier Development Council (GMSD)

***“If your actions inspire others to dream more, learn more,***

***do more and become more, you are a leader.”*** - John Quincy Adams

Stephen is a well-rounded individual.

* Being enthusiastic about travel, gaining new experiences, and learning new cultures; he appreciates the open-mindedness and perspectives it offers. This has brought him in touch with humanity and allows him to connect with others from different backgrounds and life experiences.
* Regularly, you can find Stephen with his nose in a book as he recharges and feeds his desire to learn and grow.
* As a cyclist, marathon runner, 3rd Degree Black Belt in Tae Kwon Do, and a Kilimanjaro summit climber, Stephen is extremely dedicated to health and wellness.
* Stephen is dedicated to bringing awareness to the prevalence of child trafficking and slavery. His activism through Wellspring Living and International Justice Mission, acknowledges each person’s basic right to live with dignity.

He and his wife of 35 years, Jamie, live a blessed life in Atlanta, GA and together, they have raised three accomplished children Danielle, Serena, and Gordon.

***“The future depends on what you do today.” –*** Mahatma Gandhi