



CORNERSTONE
WEALTH ADVISORY, LLC.

THERESA STEINKAMP, CPA FINANCIAL ADVISOR



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Theresa has her own financial planning practice within *Cornerstone Wealth Advisory LLC*, a boutique financial services firm under the umbrella of *Strategies for Wealth*.

Here, she combines her background as a CPA who ran the Accounting/ Finance Departments at closely held businesses with her experience in investments and insurance to provide business owners with a robust financial perspective & roadmap for their future. She finds that often business owners are so busy running their company, they don't have time to devote to areas such as:

- how to best position & grow their assets inside and outside of the business
- restructuring retirement or pension plans for optimal tax benefits
- group & executive benefits design
- business succession planning
- transfer of assets to family members/ estate planning

Theresa is dedicated to helping these individuals put plans into place to ensure everything they have worked so hard to achieve is both protected and continues to flourish.

She holds the following licenses and designations: CPA, Series 7, Series 66, Insurance, and RICP.