

Steven T. Swindler, CFP[®]
Senior Financial Advisor



Steven Swindler is a Senior Financial Advisor in the Stuart, Florida office of HBKS[®] Wealth Advisors (HBKS[®]). He began his career in 2002 working for the Schramm Company, P.A. and the Schramm Investment Company, LLC founded by Principal and Senior Financial Advisor, Stephen Schramm. The firm merged with HBKS[®] in 2004.

Mr. Swindler currently specializes in providing comprehensive financial services to individuals, families and small businesses. The Stuart Team strongly believes that a successful client-advisor relationship is achieved through a financial plan that integrates solutions for each of the client's financial issues versus focusing on only specific components. Without a comprehensive, integrated plan, it is difficult for a client to achieve their goals.

As a Senior Manager for the firm partner HBK CPAs & Consultants, Mr. Swindler handles tax and consulting matters for select individuals and business engagements.

Mr. Swindler earned a Bachelor of Arts degree in Business Administration from the University of Florida. He is a CERTIFIED FINANCIAL PLANNER[™] and the Treasurer of the Martin Interagency Network for Disasters, Inc.

Mr. Swindler and his wife, Heather, reside in Stuart with their two sons and in his leisure, he enjoys playing softball, golf and boating.

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