



SteVan H. Gates, CRPC®

***Partner / Private Wealth Advisor
Financial Strategies Institute***

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SteVan H. Gates has 25 years of experience offering strategies in investment management, financial independence, retirement transitions, Medicare, social security, business succession, income tax reduction strategies, life insurance, estate planning and the financial and emotional issues involved in wealth transition.

Clients appreciate his discerning questions to understand what's important to them, the low key 2-3 appointment step by step process to assist in making smart decisions, protecting wealth, keeping more of what they make, taking care of heirs and making a difference.

SteVan has earned his client's trust by his experience, credentials, specialization and an amazing experienced TEAM behind him.

SteVan's Team:

Ernest Hathaway, CFP®
CPA and Attorney Partners Alliances
CFA Partners Alliances

Client Service Managers - Merry Dawn Johnson & Peggy Hamlin
Practice Manager - Kathy Beckstead
Lexie Germaine & Suzanne Lutz - Client Care & Communications

Honors, Education and Experience:

- ***Chair***, of the Prestigious *Allegis Advisor Group Advisory Board* 2015 & 2016.
- ***"Investment Advisor of the Year 2015"*** with Allegis Investment Advisors.
- Selected to the ***Elite*** Lincoln Financial Advisors/Sagemark Consulting Private Wealth Service Group (SPWS), an "Advanced Planner Group."
- A ***"Top 50 Financial Planner Nationally"*** Sagemark Private Wealth Svcs. 2007, 2008, 2009, 2010 & 2013.
- Over 25 years of experience in the financial services and wealth planning disciplines.
- ***Nationally Recognized Speaker*** for Retirement Income & Wealth Protection and Management Strategies.
- Director of Professional Development 1997 - 2001 Lincoln Financial Advisors, Salt Lake City, Utah.
- ***"Manager of the Year in 2000"*** Lincoln Financial Advisors, Regional Planning Office Salt Lake City, Utah.
- ***CRPC®*** - Chartered Retirement Planning Councilor from the College for Financial Planning.
- ***CFP®*** - Student, Bryn Mawr College Pennsylvania, College for Financial Planning.
- Member of the Financial Planning Association (FPA) 2000 – 2017.
- Alumnus of Communications & Economics, University of Utah & Weber State University.

Family

SteVan and his wife Jolene of 31 years live in Bountiful, Utah. They have four fantastic children, David, Nathan, Michael & Lexie. SteVan's hobbies include spending time with his children, reading, running, charitable interests, PARC Board Member, travel, golfing & skiing.