

CAMBRIDGE FINANCIAL PARTNERS, LLC.



DAVID F. (DAVE) STEPEK

40916 CALLE LOS ARBOLES

INDIO, CA 92203

949.247.3547, OFFICE 949.247.3510, FAX

DAVE.STEPEK@CAMBRIDGEFP.COM

CA INSURANCE LICENSE #0D78759

QUALIFICATIONS: Experienced Financial Advisor with more than 13 years active consulting in Financial Planning, Insurance and Risk Management, including strategic and tactical portfolio development and execution, and business owner succession, exit and transition planning, Pension and Defined Contribution Qualified Retirement Plans.

FINRA Series 7 and 66; CA Life and Health Insurance Licenses

EXPERIENCE: Cambridge Financial Partners, LLC. | Newport Beach, CA
Financial Advisor, 3/2012-present

Previous Financial Services Experience: Ameriprise Financial (Alpharetta, GA), Massachusetts Mutual (Newport Beach, CA), PMB Securities Corp (Newport Beach, CA), AIG Financial Advisors (Mission Viejo, CA), AXA Advisors (Irvine, CA)

Five years consulting with business owners and C-Executives, including expert witness testimony in twenty-five state and federal hearings, on retail dealer operations, dealer and market development. Thirty years automotive manufacturer and importer experience, rising to level of corporate vice president and national corporate manager.

ACTIVITIES: Investment Advisor Representative, Southern California (2004 - Current), San Clemente Rotary Club, *Member* (2008 - Current), Prov. District Manager, Irvine, AVP (2009 - 2010), Financial Planner, AVP Newport Beach (2004 - 2005), West Point Society of Orange County, *Board of Directors* (2004 - 2009)

EDUCATION: Bachelor of Science Degree with emphasis in Engineering, 1964
United States Military Academy | West Point, NY

Certificate Courses in Personnel Management, Dealership Management, Used Vehicle Management, Financial Statement Analysis, Dealership Accounting, Public Speaking

PERSONAL: Dave and his wife, Beth make their home in Indio, California. In his free time he enjoys time with their sons and grand children, golfing, travel, and reading.

Registered Representative of and securities offered through OneAmerica Securities, Inc., Member FINRA, SIPC, a Registered Investment Advisor, 3300 Irvine Ave., Ste. 385, Newport Beach, CA 92660, (949) 247-3500. Insurance Representative of American United Life Insurance Company® (AUL) and other insurance companies. Cambridge Financial Partners, LLC, is not an affiliate of OneAmerica Securities or AUL and is not a broker dealer or Registered Investment Advisor.

