



Professional Profiles

Stephen Schramm, CFP®, CPA/PFS Senior Financial Advisor, Principal



Stephen is a Principal and Senior Financial Advisor in the Stuart, Florida office of HBK Sorce Financial LLC (HBK Sorce). He believes in providing comprehensive services including tax consulting and preparation, investment advisory services and financial planning to best meet his clients' needs.

Stephen's experience in financial services and public accounting began in 1988. Stephen started his professional career with Arthur Andersen & Co. in Orlando, Florida and Denver, Colorado where he specialized in the real estate, manufacturing and financial institution industries. In 1992, Stephen established a public tax and accounting firm which completed several multi-million dollar tax-service contracts with the federal government. In 1996, Stephen's firm began emphasizing personal financial advisory services based on the belief that a client's tax and financial issues are interdependent. He joined HBK Sorce in 2004.

Stephen enjoys water-skiing, golfing, snow skiing, reading, traveling and spending time with his wife, Colleen, and their two children.

Education

- BS Degree in Business Administration, West Virginia University
- Masters Degree in Accounting, University of Florida
- CERTIFIED FINANCIAL PLANNER™ Certification
- Certified Public Accountant/Personal Financial Specialist (CPA/PFS)

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