

No one ever said wealth management had to be a difficult process

In fact, it's about curating your life

As a STSWM we help our clients manage the complexities of growing wealth

Through all stages of life

The planned and unplanned events,

The exciting developments,

The moments of loss,

Or the grind towards your goals.

We're with you for each moment that affects your finances,

We put you first.

Our mission is to help you reach your unique financial summit.

We are a tight knit team of financial advisors and client support staff members.

Our diversity of backgrounds and depth of knowledge

Help keep you on track toward your destination.

Each client receives institutional quality advice through goal-based planning.

With us, wealth management doesn't have to be a burden.

Along your financial journey, why not Enjoy the Ride?