



Steven Minkoff, CFP®

Advisor & Managing Director

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Steven is a Certified Financial Planner® practitioner, which enables him to bring a wealth of experience and knowledge to his role, and help clients pursue their long-term financial goals.

With his emphasis on detail and process driven nature, Steven has developed a streamlined, comprehensive, client-focused approach to financial planning which embraces client's financial goals. He works closely with clients to develop customized financial strategies which incorporates sophisticated investment planning, retirement planning, estate planning, and succession planning.

Steven has been recognized as one of the 400 Top Financial Advisors in the U.S. Financial Times and named to the Forbes Best-In-State Wealth Management teams. He has also been quoted in Nerdwallet, USA Today and The Business Insider. San Francisco Magazine and Diablo Magazine also recognize him as a Five Star Wealth Manager.