

Steven D. Brett

MARCUM FINANCIAL SERVICES, LLC

With more than 20 years of combined investment and business experience, Steven D. Brett, joined Marcum Financial Services, LLC* after spending several years with a leading global financial institution. As a Raymond James financial advisor, Mr. Brett is dedicated to helping clients manage the wealth they have already achieved and then reach even greater financial heights. To accomplish these goals he provides clients with a wide array of tailored financial and investment services to help them meet their financial objectives and build their wealth. His clients include families, individuals, business owners and foundations, and his efforts often include coordinating plans with clients' other professional advisors.

Mr. Brett's financial services background has been shaped by the challenge and intellectual stimulation gained from working several years on an institutional trading desk collaborating with the leading money managers and traders in the industry. He has utilized this experience and knowledge within the private client group to advise his clients, and finds its greatest reward to be the close relationships he has built with clients over the years.

Mr. Brett's experience in the special needs area helps families prepare for the financial future of a loved one living with a disability. In addition, he hosts workshops and seminars for Special Education Parent and Teacher Associations and nonprofit organizations serving the special needs community.

Mr. Brett's diversified experience also includes owning a manufacturing and importing company.

Professional & Civic Affiliations

Financial Planning Association of Long Island, Member
Financial Services Institute, Inc., Member
Long Island Real Estate Group
Long Island Special Olympics
Special Needs Network of Financial Advisors
Jericho Youth Football League, Co-founder
Ithaca College, Intercollegiate Football Program

**Securities offered through Raymond James Financial Services, Inc., Member FINRA/SIPC.
Marcum Financial Services LLC, Marcum Group and Marcum LLP are not affiliated with Raymond James Financial Services, Inc.*



Steven D. Brett
President,
Marcum Financial Services LLC
Branch Manager,
Raymond James Financial Services

AREAS OF EXPERTISE

Asset Protection Planning
Wealth Management
Retirement Planning
College Planning
Investment Planning
Portfolio Development
Legacy Planning

KEY CLIENTS

High-Net-Worth Individuals & Families
Business Owners
Foundations
Families of Individuals with Disabilities

EDUCATION

Bachelors of Science, Marketing
Ithaca College

ACCREDITATIONS & DESIGNATIONS

Accredited Retirement Plan
Consultant (ARPC)



MARCUMGROUP
MEMBER



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