Steve Schippel,CFP®, CSA
Steven L. Schippel Consulting, LLC.
CERTIFIED FINANCIAL PLANNER™
Certified Senior Advisor (CSA)®

Steve began his career in financial planning with American Express Financial Advisors Inc. (formerly IDS Financial Services) in 1984. He was recognized as the top financial planner among 1,200 first-year American Express planners in the country. Shortly after that, Steve became a training manager and was quickly promoted to District Manager in 1985. He held that position for 2 1/2 years. In 1987, he was appointed Division Vice-President in Orange County, California and served in this capacity for 5 years. He supervised over 100 financial planners and staff who served 18,000 clients. Steve did extensive training across the country for American Express Financial Advisors to share his successful strategies and procedures. He received the top leader award for 5 consecutive years from 1988-1992.

He then decided to return to private practice in early 1993 and at the end of his first year, became the top financial advisor in the Washington, D.C./Baltimore Market Group and maintained that level for four consecutive years. He has built his business by providing comprehensive financial planning advice to his clients with major emphasis on estate planning, retirement planning and asset allocation(investment planning.) Steve was recognized in the top 1% of the company's 8,000 planners in terms of quality of financial planning and asset management.

After years of advocating the needs of clients with the senior management of American Express, Steve realized he would need to develop a relationship with a firm who would allow him to have the true objectivity he felt a financial advisor should maintain. Currently Schippel Consulting, LLC. has affiliated with several top money managers across the country. The objective is to match up the money manager with the client's personality and investment objectives. Schippel Consulting, LLC. works on the client's behalf to monitor the money managers and co-ordinates with any other professionals needed to bring the client's financial picture into focus. Schippel Consulting, LLC. does all of the financial planning needs the clients require.

Steve earned the Certified Financial Planner (CFP®) designation in 1987. In addition, he acquired 6 various NASD licenses and is a Registered Investment Advisor(RIA) in Arizona and Maryland. In 2006 Steve earned the Certified Senior Advisor(CSA)® designation so he would be better equipped to help clients with the aging process. He has maintained his continuing education credits by attending and teaching advanced training sessions in retirement planning, estate planning, and planning for seniors.

Steve was raised in Northern Ohio and moved to Southern California in 1984. In 1993 he and his family moved to the Washington, DC area and then in 2001 Steve, his wife, Dorothy, and their youngest child, Trevor, have settled in Anthem, AZ. Steve continues to build his business with selected clients throughout the country.