

 [Schedule a Call](#)

Douglas Stefanini

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Holistic FINANCIAL SUPPORT



Partner WITH INTEGRITY

Doug delivers collaborative financial guidance that puts your goals first. He seeks to empower you with confidence and clarity through:


- ✓ Straightforward Support
- ✓ Personalized Approach
- ✓ Genuine Respect
- ✓ Advanced Planning Tools



Customize YOUR EXPERIENCE

Each service offering derives from one of the core financial guidance areas listed below to support your ongoing needs:

- ✓ Family Financial Planning
- ✓ Investment Management
- ✓ Estate Planning Considerations
- ✓ Practical Tax Planning Strategies²


 "His personal consideration and interest in me [are] unmatched...I truly feel like he is *caring for me and my money as if it were...his own.*"
 - Bill L.



Build YOUR VISUAL FINANCIAL MAP

Scan QR code or [click here](#) to access the visual tool. No download required.

¹This testimonial and/or endorsement was given by a client of the financial advisor and no compensation was provided directly or indirectly. This testimonial is not a guarantee of future performance or investment success, and the testimonial may not be representative of the experience of other customers. Visit BrokerCheck (<https://brokercheck.finra.org>) to see more on the background of this professional.

²The information in this material is not intended as tax or legal advice. Please consult legal or tax professionals for specific information regarding your individual situation.

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