

ALISON N. STINE, CFP®, RICP®

FOUNDER - STINE WEALTH MANAGEMENT



Alison was born and raised in Southern California. She came to Arizona to study Finance at the University of Arizona's Eller College of Management. After graduating early and with honors, she began her investment career in 2013 as her passion lies in helping others. Alison obtained her Securities licenses in 2014. Alison was promoted to Vice President in 2018 after earning her General Securities Principal license. She earned her Retirement Income Certified Professional (RICP®) designation in 2019, as her practice focuses on planning for the distribution of assets in retirement. She went independent and founded Stine Wealth Management in 2020. Alison completed the CERTIFIED FINANCIAL PLANNER™ certification in 2023.

Stine Wealth Management has a focus on putting clients first. Alison enjoys building long-term relationships with her clients and loves seeing their plans unfold and adjust as time passes. She meets with clients face-to-face (or virtually) to help them plan their financial futures. Alison has much experience in retirement planning, risk management, tax-efficient strategies, and assisting clients through the 3 phases of wealth: accumulation, distribution, and wealth transfer. Alison prides herself on educating her clients and communicating regularly.

Civic duty & community involvement are essential to Alison. She serves on the Associate Board of the Boys & Girls Clubs of Greater Scottsdale. Alison lives in Scottsdale, AZ with her husband Billy, daughter Sadie, and their dog Jordy.

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Licenses:
Securities Licensed
Life, Accident, & Health Insurance

Designations:
CERTIFIED FINANCIAL PLANNER™ Professional
Retirement Income Certified Professional (RICP®)

Recent Awards:
2023 100 Women to Know in America - KNOW
2022 Under 40 in Wealth Management - ABA
2022 Most Admired Leaders - Phx Business Journal
2022 Wildcat Career Champion - UofA Eller College

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