



# Great Lakes Wealth

**Great Lakes Wealth** is an award-winning wealth management firm that combines Wall Street Solutions with Main Street Values to bring common-sense investing to clients around the globe. The Northville, MI based wealth management firm offers goals-based financial planning, superior asset and wealth management solutions, and concierge-style client service. GLW strives to meet the unique financial needs of clients of all sizes in an ever-changing economy.



At the helm of Great Lakes Wealth is CEO and Chief Investment Officer, Dewey D. Steffen. Steffen co-founded Great Lakes Wealth in 2016 and he provides over 30 years of investment management experience and global wealth management solutions to the firm’s clients. GLW’s Senior Operations Specialist is Carmela Eastin. Eastin helped launch Great Lakes Wealth and brings over 30 years experience as well. Great Lakes Wealth currently works with clients in 23 states and manages over \$225 million, with discretionary AUM \$165+ million and AUA of \$60+ million.



**PODCAST:** CEO & Chief Investment Officer of GLW and Host of the *What Dewey Do?* Podcast, Dewey D. Steffen, informs the community on the complicated world of finance to help listeners lead happier, wealthier lives. This biweekly podcast strives to educate and entertain on all topics of money and provides guidance to a global audience. The podcast also introduces listeners to leaders in our community. With over 250,000+ downloads and over 8,000,000+ total engagement on social media, WDD? is one of the fastest growing financial podcasts in America, and... we’re just gettin’ started!

**GIVING BACK:** Great Lakes Wealth prides itself on community leadership and social responsibility, striving to give back in more ways than one. The firm has been able to reach various community organizations with services and funding from 2016-2025. Through local events and fundraising initiatives, GLW continues to engage with our community by providing meals for our local neighbors in need in partnership with Gleaners Food Bank & Northville Civic Concern, while also supporting U.S. veterans through Wounded Warriors & Defender Mobility. GLW supports other organizations too, including Corewell Health, Champions Circle, Jalen Rose Leadership Academy, Schoolcraft College, Plymouth High School, and DCFC youth soccer. Additionally, to promote financial literacy, our team members are available for public speaking (upon request), and we continue to expand out proprietary *What Dewey Do?* Podcast, which now had over 8 million total watches and listens!



Great Lakes Wealth, LLC is a Registered Investment Advisor. The information provided is solely for informational purposes. Advisory services are only offered to clients or prospective clients where Great Lakes Wealth, LLC and its representatives are properly licensed or exempt from licensure. No advice may be rendered without a service agreement in place. Securities offered through Purshe Kaplan Sterling Investments, Member FINRA/SIPC Headquartered at 18 Corporate Woods Blvd., Albany, NY 12211. Purshe Kaplan Sterling Investments and Great Lakes Wealth, LLC are not affiliated companies. Any material on this page is for informational purposes only and does not constitute an offer to sell, a solicitation to buy, or a recommendation for any security, nor does it constitute an offer to provide investment advisory or other services. The opinions expressed herein are for general informational purposes only and are not intended to provide specific advice or recommendations for any individual or on any specific security. To determine which investments may be appropriate for you, consult your financial advisor prior to investing. WDIV “Best Financial Advisor in Metro-Detroit” Winner in 2017, 2018, 2019, 2020, 2021 and 2022: Great Lakes Wealth is honored to have been named “Winner” of Click-On Detroit’s Vote 4 The Best contest in 2017, 2018, 2019, 2020, 2021, and 2022. This award has only one “first place winner” in each sub-category each year and is decided by the number of cumulative votes received from the users of the Click-On Detroit Vote 4 The Best website and is based on open entry into a specified category and sub-category. Users may nominate one (1) business in each sub category during each day of the open nomination period. Voting is allowed once per hour during a prediscovered number of days, is open to the public to vote,