



**Steve Thoren**

Business:

**How long have you been in the business?**

I've been in the financial services industry since the summer of 1985. It all started when I was working with my father-in-law at his clothing store. A client came in one day and asked if I'd ever considered a career in the insurance industry. That conversation changed the course of my life.

**Why did you want to become an advisor / Why should anyone else want to be an advisor?**

At the time, I wasn't sure I wanted to stay in the retail industry—especially as I saw small-town shopping beginning to decline. I saw the financial services world as an opportunity not only to build a more stable career but to truly help people improve their lives. Being an advisor offers the chance to guide others through important life decisions and make a meaningful impact.

**What is the most important aspect of working with clients in your opinion?**

To me, the most important part of working with clients is listening. Every person has a unique story, set of goals, and comfort level when it comes to their finances. It's my job to listen closely and tailor my advice to meet their individual needs. Understanding where they're coming from helps me offer better solutions—and ultimately, helps them live better lives.

Personal:

**Please tell us about your family.**

My wife, Cindy, and I will be celebrating our 50th wedding anniversary this summer. We have one daughter, Heather, who is married to her husband Kirk, and they live right here in Cedar Rapids.

**What do you like to do outside of working?**

Outside of work, Cindy and I love taking weekend getaways and spending quality time with family and friends. As for me—I'm a big fan of golf. And when I'm not golfing... I'm probably golfing some more.

### **What is a surprising fact about you people may not know?**

A fun fact people may not know about me—I'm older than I look! 😊

### Relationships:

#### **Describe your association with Strellner Financial Group.**

Being part of a collaborative agency environment has allowed me to evolve with the needs of our clients. Over the past 40 years, I've shifted from being a "jack of all trades"—selling life, health, and mutual funds—to focusing exclusively on health insurance as the Agency Health Advisor. The support and shared knowledge across teams have helped me stay ahead of the ever-changing health insurance landscape, ultimately benefiting the people we serve.

#### **Why are relationships so important in this business?**

Relationships are at the heart of everything we do. They're what keep us going—and growing. This business is built on trust, and that trust only comes from taking the time to understand and genuinely care about the people we work with.

### Thoughts or Advice:

#### **Explain what it takes to be a successful advisor?**

To be a successful advisor, you have to continually educate yourself in this ever-changing environment—and always keep your clients' best interests at the center of everything you do. I can't tell you how many times a client has told me, "I've got a guy," when referring a friend or loved one who needs help. That kind of trust and word-of-mouth only happens when you stay committed to doing the right thing. It's a win-win for everyone involved.

#### **As a leader in this industry, what is your #1 tip for those up and coming?**

Find yourself a mentor. I can honestly say I wouldn't be where I am today without mine. My friend and mentor, Dan Buffington, helped me stay positive through the ups and downs when I was first starting out—and even brought a little fun into the process. I'm also incredibly grateful to Tim Strellner, who recognized how my health insurance focus could provide real value to the financial advisors in our office.

### Comments from Leadership:

*"Steve has been a highly valued member of our organization for over 40 years. For many of those years, he has been considered the 'health expert' within our team of advisors, helping both his own clients and those of other advisors navigate the ever-changing world of health insurance. Steve is usually one of the first people to the office each morning—and he makes a great pot of coffee! Thank you, Steve, for your many years of leadership, guidance to your clients, and support to fellow advisors within Strellner Financial Group."- Tom Fox, Rusty Fieldman & Eric Kaestner, SFG Partners*