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Steven Z. Heifetz has been involved in the financial services industry since 1989, beginning his career with IDS Financial Services and has been part of Sindrich & Associates since 1997. He is a graduate of the University of Wisconsin with a bachelor's degree in Industrial Education followed by a master's degree in Industrial Management and is a Certified Financial Planner® professional.

He focuses on comprehensive financial planning which includes the areas of: asset allocation\*, wealth accumulation and protection, tax management\*\*, retirement planning, risk management and estate planning. He is a Registered Representative and a Registered Investment Advisor Representative with NFP Securities, Inc. and is also a member of Partners Financial.

\* Diversification does not guarantee against loss. It is a method used to help manage investment risk.

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