

# Hein Wealth + Tax Solutions, LLC

A Member of the Fusion Advisor Network

## STEVEN HEIN, CPA, J.D., MBA, LL.M PRINCIPAL



Financial planning is a partnership built on trust and integrity. As an independent financial planner, Steve Hein works with individuals, families and business owners to help them understand the importance of developing a strategic, long-term financial plan that helps them achieve their financial objectives. He takes the mystery out of complex issues so that clients fully understand all of their options.

Steve helps clients understand their current financial situation and define their future goals. Whether it is insurance planning, wealth accumulation and preservation, a secure retirement or leaving a legacy, every person, family and situation is unique and requires customized and highly personalized solutions.

Steve meets with clients regularly to make sure that, as personal and business situations change, their financial plan remains on-target to meet their goals. It is important that clients understand each of his recommendations before implementing any specific proposal.

As an independent financial professional Steven avoids the conflicts and pressures associated with proprietary products. He draws from a broad array of resources, services and offerings, including the expertise of other financial professionals to benefit his clients.

Besides his experience as a financial advisor, Steve has a B.S. in accounting from Binghamton University; a J.D. and MBA from Buffalo University and an LL.M in taxation from New York University. He is a member of the New York and Florida Bar Associations and a CPA in New York and Florida. Steve is a member of the Tax Court and the Tax Executive Institute. He is a member of the Palm Beach County Estate Planning Council and the American Association of Attorney-Certified Public Accountants. While working for Florida Power & Light in tax litigation he settled a \$500 million tax case as well as several other large tax issues.

Steve and his wife, Lisa have two sons, Daniel and Joel. When he is not on the baseball fields with his sons, he works in his community. He sits on the Board of Directors of Big Brothers & Big Sisters and is an active member of his temple. His favorite job? A summer spent scooping ice cream cones in front of Old Faithful at Yellowstone National Park.

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