

Douglas Stepansky

8787 W. 140th Street, Orland Park, IL 60462

Home: 708-590-6873 Cell: 773-573-4569 Work: 708-428-1941

ds4k@yahoo.com

Education	Northeastern University, Boston, Massachusetts Masters of Business Administration Eastern Illinois University, Charleston, Illinois Bachelor of Science in Business Management
Profession	<u>Strategic Investment Solutions, Inc. 9501 W. 144th Place, Suite 101, Orland Park, IL 60462</u> Partner, officer, and financial planner in a SEC Registered Investment Advisory (RIA) firm serving over 400 households with over \$400 million in assets under management. In addition to my advisory role I also serve as Chief Compliance Officer (CCO) and OSJ Supervisor for the RIA where I ensure the firm is compliant with SEC and FINRA rules and oversee the business of several producing advisors. I also have a seat on the firm's investment committee where we make investment portfolio asset allocation and strategy decisions. My role requires me to pay close attention to economic trends, interest rates, and overall market conditions.
Background	I have been a full time financial advisor for almost 18 years where I have been actively advising clients and businesses on financial planning, investment, insurance, and retirement plan strategies. I have a clean background in the industry with no client complaints or disclose events.
Licenses	FINRA Series 7, Series 66, Series 24; Illinois Life, Health, Property, and Casualty Insurance
Certifications	Certified Financial Planner (CFP®), Accredited Investment Fiduciary (AIF®), Notary Public
Personal	My parents moved to Orland Park in 1979, so I grew up watching the community develop and grow. Now that I am raising a family of my own and have a business in Orland Park, I am very interested in seeing that growth continue and maintaining Orland Park's standing as a premier community. I also enjoy basketball, sailing, and playing with my three kids.