

## About Steven Schmitt

A seasoned professional, Steven works closely with a broad array of clients, including executives and business owners, retirees and those planning for retirement, and members of the LGBTQ community. His extensive investment experience has enabled him to develop a strong understanding of economics and the equity and fixed income markets. He has also cultivated specialized skills in LGBTQ estate planning issues and helping clients manage their concentrated stock positions.

While studying meteorology at Penn State, Steven and his best friend started day-trading. With a deep passion for analysis and his new-found interest in the markets, Steven soon transitioned to Finance, while maintaining his interest in meteorology. Upon graduation, Steven worked on the trading floor at Virginia Power before joining Merrill Lynch as an energy analyst. It was here where he discovered how much he enjoyed asset management and where he also met his future business partner, Kyle Young. Following 9-11 and a paper he read focusing on the underserved LGBT community, Steven and Kyle formed the Schmitt-Young Group and made a lifelong commitment to serving the needs of this community and their allies. Today, the Schmitt-Young Group has over 700MM in Assets Under Management.

Throughout his career, Steven has amassed an impressive list of educational credentials. He holds the CFP® and CRPS® designations and was instrumental in the creation of the ADPA® program. After earning his B.S. degree in Finance at Penn State, Steven obtained his M.B.A. from William Paterson University. Steven's enduring interest and passion for meteorology provides a distinct perspective on environmental conditions that he often incorporates into his investment strategies.

Steven lives on both coasts with his husband, Paul, in order to support his thriving practice. Outside of the office, Steven enjoys traveling to exotic destinations, storm chasing, snowmobiling, hiking and was appointed to the Gay Men's Chorus of Los Angeles's Board of Directors. Steven focuses on donating much needed time and resources to LGBTQ organizations. [Learn more about my specialty in Equity Compensation](#)[Link Opens in New Tab](#)  
Securities Agent: OK, RI, WV, TX, OH, GA, MO, MD,