

STONEBRIDGE™

ADVISORS



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The world we live in is complicated and hurried... a voice of reason and experience is an invaluable asset. We strive each and every day to provide sound, needed and valuable advice to our clients so that they are able to pursue their goals and enjoy their success. Our clients are focused on raising families, running companies, and enjoying their free time. They don't want to spend time figuring out how to optimize their cash flow in retirement, or how to ensure their financial independence by their target date and they know there are things they ought to be doing for their own financial benefit but don't know how to do get it done. That is what we do. We help our clients identify and crystallize their goals, map a path toward achieving them and assist them in the process of getting to the finish line.

After graduating from the U.S. Naval Academy in 1988, I was fortunate to serve nearly 10 years with one of the finest organizations in the world, the United States Marine Corps. I was assigned as a Naval Flight Officer in the F/A-18 Hornet in California and overseas. In that job, I learned the value of detailed planning, strategic thinking and the power of communication. I have applied those skills, and others, in building a successful financial advisory practice in Central Maryland. I work with families who are interested in improving or securing a standard of living that they desire. I lead our clients through a process that allows them to make informed decisions that improve their financial well-being and ensure they maximize their fiscal potential.

I am a 10 time member of the President's Cabinet at Lincoln Financial Advisors and a member of the Resource Group there as well. I was the New Planner of the Year for the Lincoln Baltimore office in 1998 and selected for their Vice-President's Seminar. I am series 7, and 66 certified. I am active in the local community and in my church. I am an avid golfer, and reader. I live in Severna Park, MD with my wife Kate and three children Chase, Mackenzie and Cole.

President's Cabinet an internal designation of Lincoln Financial Advisors Corp. based in part on assets under management, sales and compliance criteria.

The Resource Group (TRG), an invitation-only, nationwide network of the top 200 planners within Lincoln Financial Advisors.

The New Planner of the Year is an internal award is given to new LFN planners each year and is based on sales, quality of service, and commitment to Lincoln's principles, and is selected by Lincoln senior managers.

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