

# Steven T. Sweeney

CFP®, CLU®, ChFC®

## Senior Sales Consultant, Advanced Markets



**STEVEN SWEENEY** brings more than a decade of financial services experience to his role as a senior sales consultant with Transamerica's Advanced Markets Group. He works in helping financial professionals address issues related to complex case design, retirement preparation, investments, and life insurance.

Before joining Transamerica, Steve was a regional variable annuity and life insurance consultant who worked to serve the needs of his financial advisors. He spent the first eight years of his career working closely with small business owners as a field representative and territory manager for a Chicago-based insurance and financial planning firm.

Steve earned his bachelor's degree from the University of Pittsburgh and his Master of Business Administration from Colorado State University. He also holds FINRA Series 6 and 63 registrations and carries the Chartered Life Underwriter® (CLU®), Chartered Financial Consultant® (ChFC®), and Certified Financial Planner™ (CFP®) designations.

Steve lives in Highlands Ranch, Colorado, with his wife, Caitlin, and their two children, Charlotte and Levi. He enjoys spending time with his family, as well as skiing, fly fishing and cycling.

### At a glance

- More than a decade of experience in financial services
- Small business experience
- Focuses in growth and protection strategies

### Accreditations

- Chartered Life Underwriter® (CLU®)
- Certified Financial Planner™ (CFP®)
- Chartered Financial Consultant® (ChFC®)
- Certified in Long Term Care (CLTC)
- FINRA Series 6 and 63 registrations
- Life and Health Insurance License

### Background

#### CURRENT RESIDENCE

Denver, CO

#### EDUCATION

MBA, Colorado State University,  
Bachelor's Degree, University of Pittsburgh

#### HOMETOWN

Sewickley, PA

### Get in touch



#### EMAIL

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#### VISIT

[TransamericaAdvancedMarkets.com](http://TransamericaAdvancedMarkets.com)

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, Certified Financial Planner™, and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

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