



Steven T. Sweeney

Vice President, Advanced Markets and Solutions

Background

With more than 17 years in the financial services industry, Sweeney has broad experience across disciplines of financial planning. Sweeney uses a wide array of sophisticated techniques to counsel financial professionals as they guide clients through their financial journeys.

Experience

- Provides support to financial professionals with issues related to complex case design, asset accumulation, and tax efficiency.
- Prior to joining Allianz Life, Sweeney worked at Prudential and Transamerica. He also worked as a life insurance and variable annuity wholesaler.
- Featured speaker at regional and national conferences and author of financial planning articles.

Education, certifications, and memberships

- Master of Business Administration from Colorado State University
- Bachelor's degree from University of Pittsburgh
- Certified Financial Planner
- Chartered Life Underwriter
- Chartered Financial Consultant
- Retirement Income Certified Professional

→ FOCUSED ON:

- Portfolio construction and capital markets
- Retirement income and portfolio distribution strategies
- Tax management strategies
- Estate planning strategies
- Risk management and insurance
- Charitable planning strategies

Allianz Life Insurance Company of North America does not offer financial planning services.

Insurance and annuities are issued by Allianz Life Insurance Company of North America. Variable annuities are distributed by its affiliate, Allianz Life Financial Services, LLC, member FINRA, 5701 Golden Hills Drive, Minneapolis, MN 55416-1297. 800.542.5427 www.allianzlife.com

EXT-0017-SSweeney (R-12/2023)