



Steven T. Sweeney

Vice President, Annuity Advanced Markets

Background

With more than two decades in the financial services industry, Sweeney has broad experience across multiple disciplines of financial planning. Using a wide array of sophisticated techniques, he counsels financial professionals as they help clients navigate their financial journeys. He is a trusted partner of financial professionals who are seeking technical knowledge that supports client objectives.

Experience

- Featured speaker at regional and national conferences and author of many financial planning articles.
- 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.

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
- FINRA Series 6, 63, 7, 24

→ 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

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