



Financial Advisors of Delaware Valley

Stephanie B. Wade
Financial Advisor

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Stephanie believes that an unparalleled level of service is the key to successfully maintaining her long term client relationships. Since 1993, Stephanie has built a solid reputation of loyalty, integrity, and trust with her clients. Her mission is clear; to give her clients competitive and innovative solutions to their benefit and pension needs. To accomplish this, Stephanie brings each client through a process involving in-depth analysis, careful planning, and the appropriate solutions and recommendations tailored to meet each company's unique situation.

Best compliment I ever received, "You treat our large group like a mom and pop shop when it comes to service. You know all of us."

Professional Services

Fully Insured and Self Funded Benefit Solutions
Benefit Package-Creation and Implementation
401K and Pension Planning
Qualified and Non-Qualified Plan Consulting
Individual and Business Analysis

State Licenses

Registered Representative, Life & Health
Licensed in PA, NJ, NY, IN, MA, FL, SC, MD, CA, GA

Personal Information

B.A., Business Management, Widener University (1992)
Women in Financial Services (WIFS)
1st Degree Black Belt-Kempo Karate

Along with being fortunate enough to work with her father Tom and brother Brett every day, Stephanie has been blessed with a loving family; including her husband Urlin, two children Ethan and Erin and her two stepchildren Aurora and Tanner. When not working, Stephanie enjoys working out, traveling, and plenty of food, wine and music.

Offices in
Delaware ♦ Pennsylvania ♦ New Jersey ♦ Maryland

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