

# STIFEL

## Marie Steinman: A Woman Making a Major Impact



*Marie Steinman has been a successful financial advisor for nearly two decades – and she’s spent the last three years of her career thriving at Stifel.*

With so many options out there, Stifel is proud that many incredible financial advisors have chosen to join us, including [Marie Steinman](#), who joined the firm in 2020.

An experienced financial advisor, Marie is dedicated to creating customized investment strategies for her clients and has done strong work for her clients. As a result, she has received invitations to the *Fortune* Most Powerful Women Summit and *Barron’s* Top Women Advisors Summit and has qualified for Chairman’s Council at Stifel, recognizing the firm’s top producing financial advisors.

I recently had the chance to sit down with her to gain insights into her career path, her transition to Stifel, her advice for women starting their careers in our industry, and more.

### **A Meaningful Career: From Air France to Stifel**

While Marie excels as a financial advisor, she hadn’t always planned on it. Born and raised in France, she received her MBA in Economics and Finance and joined Air France in Paris, moving up the corporate ladder from Reengineering Process Project Manager to Corporate Finance and Sales Director. Later, she became Divisional Director, overseeing Air France in Switzerland. However, Marie eventually met her husband in the U.S. and moved to America in 2003 to start a new chapter of her life.

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“After managing positions at Air France in Europe, I knew I wanted to work in the personal finance industry and align with families’ and individuals’ financial needs,” she says. In 2003, she joined UBS in the private banking division as Vice President/Investments.

That was the start of her career in the private banking industry, a field that allowed her to continue working in finance at a more individual level. These days, she focuses on income planning, tax minimization strategies, estate planning strategies, retirement planning, and wealth accumulation strategies.

### Joining Stifel

After spending nine years at UBS Financial Services, she joined Merrill Lynch Wealth Management as Senior Vice President/Investments. For nearly seven years, she grew her practice, acquired the sought-after CERTIFIED FINANCIAL PLANNER™ certification, and was recognized among the top female advisors at the firm. During that time, Marie gave birth to her four children: Kevin (15), Emilie (13), Valentine (12), and Vincent (11). On February 3, 2020, Marie joined Stifel as Senior Vice President/Investments, and she has been a Chairman’s Council member ever since.

“I liked the corporate culture and the leadership styles of CEO Ron Kruszewski and President Jim Zemlyak,” she says. “Despite being a smaller firm than my previous corporate experiences, Stifel really impressed me with its capabilities.”

Marie worked with two transition team assistants who helped her and her long-time assistant, Susan, navigate the ins and outs of the system. Even though the COVID-19 numbers were rising, they remained hard at work transitioning clients.

By the time the full lockdown took place in May, Marie had already transitioned most of her clients. “It was a blessing that my branch manager let me continue working from the office,

as I had recently moved houses and did not have a scanner, printer, or home office set up yet. I finally had time to breathe once I finished the transition, and it was only then that I realized I was alone in the office and how bad COVID was.”

During the pandemic, things changed at home too. In addition to working from home, Marie had to handle the housework and occupy her four children. She delegated chores and awarded allowances for a job well done, which left the house tidier and her children with a sense of pride and increased independence and responsibility. Marie also created time-blocking sessions to help keep her children focused and quiet outside of meals and recess time. In fact, she was featured in the magazine *Psychology Today* as an example of a corporate woman who successfully navigated the work/life balance during the pandemic.

### Life as a Financial Advisor at Stifel

Pandemic aside, financial advising isn’t easy – and it isn’t for everyone.

“The challenge is that everyone is looking to you for answers and guidance,” Marie explains. “Even when the path of financial markets ahead is unclear, you have to formulate an opinion and provide answers and guidance all the time.”

Although being a financial advisor is a serious responsibility, Marie loves her job. Not only does she love helping her clients, but she also loves hearing their stories.

“I love working with families, navigating family dynamics, and helping clients make smart decisions for themselves. Psychology plays a big role. Listening is key,” she says. “I am amazed how many individuals came to America and started with nothing and created a large net worth for themselves through hard work or commitment with some bright ideas. Interestingly I noticed that money, happiness, and peace of mind have no obvious correlation.”

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### Networking, Education, and Empowerment Through WIN

Since joining the firm, Marie has been involved with Stifel's [Women's Initiative Network \(WIN\)](#), a network that provides networking, mentoring, and educational opportunities for women to help them recognize their value and reach their full personal and professional potential.

WIN may have started with a small group of Stifel's top female advisors sharing best practices and encouraging one another, but it has since grown exponentially in size and received full backing from Stifel's CEO, the board of directors, and other leaders at the firm. These days, WIN offers plenty of opportunities for women across the firm to learn and network, including monthly conference calls and WIN Wednesdays.

"I love going to the WIN meetings. They provide a safe environment in which to share and listen to other ladies' stories," Marie says. "Every time there's a female guest speaker, I also enjoy interacting with them because they're experts in their fields." One of the most recent WIN meetings Marie attended featured guest speaker Julia Boorstin, a prominent CNBC journalist.

### Being a Woman in Finance Isn't Always Easy, But It's Rewarding

Marie feels she has a special connection with her female clients as a woman. Historically, investing has been a

male-dominated field for generations, meaning many women haven't been able to form that same special relationship with a female financial advisor.

"Successful women are successful because they had to swim against the current and make tough choices to get where they are. They tend to have strong opinions and like to be in control, and it can be hard for them to ask for help," Marie says. "I understand their dynamics and speak their language."

However, Marie also understands widowers and their needs in a way most male financial advisors might not.

"Their husbands were in charge of financial affairs most of their lives, and they want guidance, education, and reassurance they will be taken care of," she explains.

Fortunately, more and more women are becoming financial advisors. In 2021, [10% of fund managers](#) were women, a 1% increase compared to 2020. For women looking to join the industry and raise that percentage, Marie has some simple advice:

"This is a rewarding career where you can choose various paths to grow your business. The key is to be open to hearing new ideas and best practices. Work on certifications and continue your education to stay at the top of your field. Always stay close to your clients, and ask them what they want. Trends change, and the future is constantly being rewritten. So, embrace changes – this will keep your career exciting and interesting!"



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