



## Steve Atkinson

Managing Director, Advisor Relations  
Loring Ward

As Head of the Advisor Relations Group, Steve Atkinson oversees a team that is passionate about helping independent financial advisors. In conjunction with the many resources at Loring Ward, the team helps advisors define their investment philosophy and create processes focused on delivering a comprehensive planning experience.

He is a graduate of the University of Nebraska at Omaha with a Bachelor's in Finance and Banking. He also holds the Certified Fund Specialist (CFS) designation along with FINRA licenses 7, 24 and 66.

Some of Steve's favorite learnings since entering the business in 1996 were the lessons from participating in Dan Sullivan's Strategic Coach program from 1999 to 2002. In his spare time Steve enjoys watching his daughters play soccer, the occasional ski trip, and fishing when the opportunity presents itself. Steve, his wife, Laura, and their three daughters live in Omaha, Nebraska.