



NEWS

For immediate release

Contact: Alyssa Jacobson
Stevens Wealth Management, LLC
Alyssa@stevenswealth.com
847 580-4240



Sue Stevens
CEO, CIO, Wealth Manager

Sue Stevens Announced as Top Woman in Wealth by AdvisorOne

Chicago-area Wealth Manager Once Again Ranks among Top Financial Services Professionals

CHICAGO (July 20, 2011) – CEO and founder of Stevens Wealth Management LLC, Sue Stevens has again been named as one of 50 Top Women in Wealth by [AdvisorOne](#), a leading resource for independent advisors, wealth managers and financial planners. The annual list recognizes the 50 most influential, powerful and inspiring women in and around wealth management.

An advisory board of noted industry leaders chose the [50 Top Women in Wealth](#) after an extensive process, making their final choices based on the nominee's accomplishments, thought leadership and inspiration as role models. The exceptional leaders on this list are responsible for managing and directing hundreds of billions of dollars of wealth, for educating and guiding wealth managers and their clients—both individuals and institutions—and regulating the markets and market participants.

"It's an honor to even be mentioned among this distinguished assembly of women business leaders," says Stevens. "As a firm, we are committed to delivering excellence in serving our wealth management clients."

Frequently named one of the top advisers in the country by Worth, Bloomberg, Forbes, Reuters, Medical Economics and others, Stevens' has held leadership roles in top financial organizations for over 20 years. Long associated with Morningstar, Inc., she was director of financial planning, a popular online columnist and founded Morningstar's personal finance newsletter. She was head of research and development for participant education at The Vanguard Group where her team won awards for creating financial education materials and programs for retirement plan participants.

“The accomplishments of these women put the lie to the outdated notion that women can’t succeed in all levels of wealth management and in every business model, including broker-dealers, banks, asset management firms and the registered investment advisory world,” said [James J. Green](#), editor of AdvisorOne.com. “These 50 women are accomplished entrepreneurs, thought leaders, money managers, personal wealth managers of all kinds and partners to those wealth managers. Their accomplishments transcend their gender, while their gender helps inform their personal values to their clients and customers.”

Because of her ongoing achievements and personal commitment to sharing knowledge, Stevens is a sought-after speaker and expert panelist on investing and retirement issues. She has presented for numerous audiences including The Garrett Network, Vanguard Diehards, Boston Globe, Portfolio Management Symposium, Baltimore Investor Conference, San Diego Investor Conference, Miami Investor Conference, FPA National Success Forum and Women Advisors Forum.

About Sue Stevens

Sue Stevens is CEO and founder [Stevens Wealth Management LLC](#). Author of four-time award winning [Put Your Money Where Your Heart Is](#), she advocates that wealth can bring genuine happiness and peace of mind when you take the time to examine what you really want in life and surround yourself with people that support and grow that dream.

Stevens holds a master’s of business administration from the University of Chicago, a master’s of science in wealth management from The College for Financial Planning, the Certified Public Accountant/Personal Financial Specialist (CPA/PFS) designation, and is both a Chartered Financial Analyst (CFA) and a CERTIFIED FINANCIAL PLANNER™ professional. Learn more about Sue Stevens at www.StevensWealth.com.

About AdvisorOne.com

[AdvisorOne.com](#) is the leading objective source of news, analysis, data and tools for independent advisors and wealth managers and independent-minded advisors. AdvisorOne.com is the flagship online publication of Summit Business Media’s Investment Advisory Group, which includes *Investment Advisor* and *Research* magazines, both in their fourth decades of providing independent news and analysis to advisors in a monthly print format, and AdvisorBiz.com.

View the full list of industry notables and a special report on the top women here: [Top 50 Women in Wealth](#).

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