



POLK COUNTY DENTAL ASSOCIATION

AN AFFILIATE OF THE WEST COAST DISTRICT,
AMERICAN & FLORIDA DENTAL ASSOCIATIONS

Polk County Dental Association

Stan Stewart, MBA

Tuesday, August 15, 2023

To help welcome in the Fall season, we are proud to announce that we have invited Stan Stewart of Virtus Financial Partners to present "Updates on tax saving strategies through Qualified plans and Roth conversions"

Stan Stewart is the founder of Virtus Financial Partners. Stan works with healthcare professionals, business owners and executives by offering them comprehensive approaches to planning for their futures. Typically, his new clients are seeking a financial advisor who will be with them over the long term and who can deliver relevant information they can understand that addresses their concerns. Many of Stan's clients turned to him to help them develop a plan to stay the course through periods of economic uncertainty. He feels they remain with him because of his level of customer service and the level of experience that he and his team provides. "The increased communication and understanding has helped my clients make more informed decisions and better position themselves to meet their goals now and into the future. They appreciate that I put their interests at the forefront of every solution." He also believes for financial planning to be successful, the entire team must understand and believe in the process. Thus the reason he takes his time with each and every client to ensure they feel comfortable with the solutions he recommends. Stan received his undergraduate degree from the University of Florida where he played baseball for the Gators. He then went on to play professionally with the New York Yankees before finishing his education with a Master of Business Administration with a concentration in finance in 2002.

Stan enjoys the opportunity to educate his clients and his community on the importance of financial independence and responsibility. He is a regular guest speaker at several medical and dental programs throughout the country. In his spare time he enjoys the outdoors with his wife and two children and regularly volunteers his time teaching members of the urban community about the importance of protecting our environment through camping and hiking excursions.



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Please RSVP with Tisha Talbot @ pcedaemail@gmail.com The meeting will be held at Grasslands Golf & Country Club, 1600 Grasslands Blvd., Lakeland, 33801. Cocktail hour starts @ 6 p.m. and dinner starts @ 6:30 p.m. The presentation will start at 7 p.m.