MarketWatch

Steven W. Lieberman, Founder and CEO of The Private Client Group, Is Recognized For A Record 20th Consecutive Year As Summit Financial LLC's Investment Leader

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PARSIPPANY, N.J., July 12, 2021 /PRNewswire/ -- One of the preeminent privately owned wealth management firms, Summit Financial LLC, announced that Steven W. Lieberman, MBA, CFP® was named the firm's Investment Leader for 2020.

For 20 years, he has consistently been recognized as the leader of Summit's top-ranking investment management practice.

Mr. Lieberman specializes in providing clients with an ever-expanding suite of sophisticated wealth management and family office services, including comprehensive planning, investment management, retirement planning, family philanthropy, family governance and education, asset protection, and estate planning.

Mr. Lieberman graduated from the Wharton School of Business with both his Bachelor's Degree (BS) in Economics and his Masters of Business Administration (MBA) in Finance. He has been an active Board Member and/or Investment Committee member of numerous privately held and charitable organizations, clubs, and societies.

Mr. Lieberman has been a member of both the Behavioral Finance Network and the Genius Network think-tanks, as well as the Select Advisors Council, the Financial Planning Association (FPA), the Wharton Club of New Jersey, and the Penn Clubs of Metro New Jersey and New York. He is a member of the UJA Ben Gurion and Lester Societies, and is a National Cabinet alum. Mr. Lieberman is an active patron of Stand with Us, the Weizmann Institute of Science, ZOA, and Chai Lifeline. Each year, his Private Client Group hosts their annual team charity event supporting the Juvenile Diabetes Research Foundation.

Mr. Lieberman resides in Short Hills, NJ with his wife, son, and identical twin daughters.

Steven W. Lieberman is the Founder, President and CEO of The Private Client Group, LLC and shareholder of Summit Equities and Summit Risk Management. Summit Financial is a privately owned boutique wealth management firm with over 200 professionals and support personnel, headquartered in northern New Jersey.