PLAN
PROFESSIONAL LIFE ADVISORS NETWORK

Steve Taber, ChFC®

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Background & Experience

Steve Taber is a veteran of the financial services industry where he has enjoyed working in various leadership capacities from the distribution/sales side to the executive management area. Steve has over 25 years of financial services experience with specialization in estate, wealth, charitable, business succession and executive compensation planning for ultra-high net worth families, business owners and senior executives with estates ranging between $5 million and $2 billion. His broad experience in working with a wide range of clients translates to creative strategies for clients in need of planning beyond just the typical solutions.

In 2004, Steve founded Mercury Financial Group, a national advisory firm which works with the top Wall Street based firms as well as banks, broker/dealers, accounting firms, family offices and Registered Investment Advisory firms. Prior to founding Mercury, Steve worked as an Estate Planning Specialist at 2 major Wall Street firms including Smith Barney, where he was one of the firm's top Specialists. Earlier in his career, he worked as a Regional VP for a Fortune 100 company managing 1 of its 22 Regional Offices. He was later promoted to a Divisional VP role managing one third of that Company's offices around the U.S.

Steve holds a FINRA Series 6 & 63.

Certifications & Education

- University of Oklahoma, Norman, OK – Master of Business Administration
- Oklahoma State University, Stillwater, OK – Bachelor of Science
- The American College, Bryn Mawr, PA – Chartered Financial Consultant (ChFC)