



STERN CAPITAL
MANAGEMENT, INC.

Financial Planning Isn't Straightforward...

Let Stern Capital Be Your Guide

Wealth Management and Financial Planning Experts

At Stern Capital we specialize in analyzing **your unique financial situation** and formulating a plan that will work specifically for you. As an **independent, fee-based**, Registered Investment Advisor held to a **fiduciary** standard, we've removed many of the conflicts of interest which plague a large portion of our industry. We believe so strongly in our portfolio management process that all employees of Stern

Capital **utilize the same investment models as our clients.** Our main goal is to provide our clients with **peace of mind** in regards to their financial plan and level of investment risk.

LEARN MORE ABOUT OUR SERVICES (/PROJECTS)

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*If You Fail To PLAN, You Are
PLANNING To Fail!*

— *Benjamin Franklin*

**CLICK BELOW TO LEARN MORE ABOUT STERN CAPITAL
MANAGEMENT!**

Stuart Stern, MBA, RFC - President

Alan Stern, MBA - Vice President

We've assisted **over 500 families** with their financial planning and wealth management needs and we would **love to help you too!** Click "Contact Us" to send us a message or call us at **(732) 679-7050**

**CONTACT
US
(/CONTACT)**



Stern Capital's Beginnings

Our founder, Stuart Stern, was working in Private Banking at a very large firm in Beverly Hills, California back in the late 1980s. In 1994 the Northridge earthquake shook his home to a point where it was no longer safe to live in. Stuart, his wife, and their 3 year old child (Alan Stern) had enough of California after numerous aftershocks following the actual earthquake. They took what they had left and moved in with relatives in New Jersey. Stuart knew his strengths, building portfolios and designing financial plans; so he took a risk and started Stern Capital Management, Inc.

Now, over 20 years later, Stern Capital manages about \$130 million (As of June 2017) and has helped over 500 families with the management of their assets and overall financial lives!

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18 Throckmorton Lane, Suite #201

Old Bridge, NJ 08857

Phone: (732) 679-7050

Fax: (732) 679-7068

Stuart@SternCM.com Alan@SternCM.com

Stern Capital Management, Inc. is a Registered Investment Advisor.

**Less Than 5% of Stern Capital Management, Inc.'s Revenue Is Earned By
Offering Securities through APW Capital, Inc.:**

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