

Lam Financial Services

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Stephen T. Lam, CPA, Financial Advisor
Elizabeth Herman, Financial Advisor

A Wealth Management FirmSM



It's not just what we do, it's how we do it.

At Lam Financial Services, our philosophy is to provide our clients with both personal and professional services. We use the-art money management strategies and technologies that enable our clients to organize their financial life, while providing you with personal touch service. We believe in long-term relationships, honoring our commitments, and understanding your business. We make open and frequent communication with our clients a priority, and strive to create holistic and plans tailored to individual client needs.

Our practice is built upon a **comprehensive** approach to Wealth Management, focusing on helping our clients protect and enjoy their money.

Because no two clients are the same, we are committed to getting to know our clients well enough in order for us to articulate and define their unique financial goals. This allows us to **proactively** provide our clients with ideas, suggestions, and alternatives to enable them to achieve success the way **they** define it.

Steve and Liz's affiliation with Woodbury Financial Services, Inc. provides us with state-of-the-art, real-time technology, office support systems, comprehensive research, due diligence, and an exceptional array of highly competitive, non-physical financial alternatives, securities and services.

Thank you for visiting us in our virtual office! Please do not hesitate to contact us for an in-person consultation.

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IMPORTANT NOTE: Stephen T. Lam is a registered representative registered to transact business with clients in PA. Elizabeth A. Herman is a registered representative registered to transact business with clients in PA and NJ. Stephen T. Lam is advisory licensed in PA. Elizabeth A. Herman is advisory licensed in NJ and PA. Elizabeth A. Herman is also an insurance agent licensed in PA and NJ. If you are not a resident of the states noted above, all investment-related information on this site is for informational purposes only and does not constitute a solicitation or offer to sell securities or insurance services over the internet.

To learn more about the professional history of our financial advisor(s), please visit FINRA’s BrokerCheck.

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