ZELNIKER DORFMAN
PRIVATE WEALTH
AT STEWARD PARTNERS

COMPANIES · ORGANIZATIONS · INSTITUTIONS

Elevate Your *Organization.*

Retention. Strategy. Stability. Growth.

Organizations today face mounting pressure to attract top talent, retain key employees, and manage capital wisely, all while navigating complex compliance, volatile markets, and a workforce increasingly stressed about money. We help you solve every one of those challenges.

INSIDE THIS GUIDE

- Wealth Management
- Our Team
- Employee Financial Wellness
- Corporate Retirement Plans
- Institutional Consulting
- Tailored Solutions For Executives

WEALTH MANAGEMENT

Capital. *Elevated.*

Managing organizational capital is increasingly complex; markets are volatile, investment decisions carry real consequences, and leadership teams rarely have the bandwidth or expertise to navigate it alone. Our institutional-grade platform brings together asset management, investment banking, and proprietary research so your organization can move forward with confidence.

OUR TEAM

When you work with Zelniker Dorfman Private Wealth, you are assigned a dedicated advisor who knows your situation, your goals, and your career timeline. You will never be passed to an associate or handled by a team you have never met. Our advisors bring decades of combined experience working exclusively with business owners.



Scott Zelniker,
CRPC™, CRPS™
Executive Managing Director,
Wealth Advisor



Molly Townsend,
CFP®, AIF®
Director, Wealth Advisor



Christopher Bostick
Vice President,
Wealth Advisor



Justin Leins
Managing Director,
Wealth Advisor

EMPLOYEE FINANCIAL WELLNESS

A Workforce *That Thrives*

Financial stress is one of the leading drivers of reduced productivity, absenteeism, and employee turnover. Our workplace financial wellness programs give your people the tools, knowledge, and personalized guidance they need to take control of their financial lives, at every stage of their career.

EMPLOYEE FINANCIAL EDUCATION

Structured, engaging education programs, delivered through workshops, webinars, and on-demand digital content, covering budgeting, debt management, credit health, insurance basics, tax planning, and long-term savings strategies tailored to your workforce demographics.

CUSTOM INVESTMENT MANAGEMENT

Our retirement plan investment management goes beyond off-the-shelf fund lineups. We build custom, institutional-grade investment menus tailored to your plan's specific participant demographics, risk profile, and organizational goals, with ongoing monitoring, fee benchmarking, and fiduciary oversight built in.

EXECUTIVE FINANCIAL COACHING

One-on-one access for company executives to certified financial coaches who work alongside employees on their individual goals, from emergency fund building and student loan strategies to home buying and retirement readiness.

CORPORATE RETIREMENT PLANS

Plans Built to Last

We design, implement, and administer retirement plans aligned to your organizational goals; whether you're establishing your first plan or optimizing a mature program. Our fiduciary-grade approach helps protect both plan sponsors and participants.

Plan Design & Consulting

Custom contribution structures, vesting schedules, and matching formulas engineered to maximize participation and minimize cost.

Investment Menu & Fiduciary Oversight

Institutional fund lineups with ongoing benchmarking, fee analysis, and an Investment Policy Statement aligned to ERISA standards.

Compliance & Administration

Recordkeeping oversight, discrimination testing, Form 5500 support, and full participant communication management.

Plan Types Served

401(k), 403(b), 457(b), Defined Benefit, Cash Balance, and
Non-Qualified Deferred Compensation plans.

INSTITUTIONAL CONSULTING

Guidance for the Long Term

01 ### Corporate Cash Management

Our corporate cash management solutions help organizations put idle capital to work without sacrificing liquidity or taking on unnecessary risk. We design customized cash strategies, spanning money market funds, short-duration fixed income, and tiered liquidity structures, aligned to your operating needs, reserve requirements, and yield objectives.

02 ### Investment Policy Statement Implementation and Monitoring

Building the right plan is only half the equation. We stay actively engaged through every stage, implementing your strategy with precision and monitoring performance on an ongoing basis, so your plan evolves as your organization grows, markets shift, and your goals change.

03 ### Institutional Consulting

Endowments, foundations, and corporate treasury consulting with investment policy development and asset allocation oversight.

TAILORED SOLUTIONS FOR EXECUTIVES

Built for Leaders

Executives face a complexity of financial considerations that we believe standard employee benefit programs simply aren't built to handle. Our tailored executive solutions bring together compensation planning, concentrated equity management, tax strategy, and estate planning strategies into a cohesive, private advisory relationship.

Executive Compensation Planning

Holistic review and optimization of total compensation: salary, bonus, deferred comp, equity, and benefits that are mapped to personal financial goals.

Non-Qualified Deferred Compensation

Design and advisory on NQDC plans allowing executives to defer income and build supplemental retirement wealth beyond qualified plan limits.

Concentrated Position & Equity Management

Strategies for managing large equity positions; including Rule 10b5-1 plans, hedging, gifting, and systematic diversification designed to mitigate risk without triggering unnecessary tax events.

Tax & Estate Strategy Coordination

Coordination with your tax and legal advisors on income tax planning, trust structures, charitable giving, and succession to help optimize wealth transfer across generations.

Steward Partners, its affiliates, and Steward Partners Wealth Advisors do not provide tax or legal advice. You should consult with your tax advisor for matters involving taxation and tax planning and their attorney for matters involving trust and estate planning and other legal matters.

Experience Matters, Knowing the Right People Can Make *All the Difference.*

We'd welcome the opportunity to learn about your situation and share how Zelniker Dorfman Private Wealth can serve as the financial partner you've been looking for.

CONTACT INFORMATION

NEW YORK
99 Park Avenue,
Suite 1910,
New York, NY 10016
212-364-0350

FLORIDA
2 North Tamiami Trail,
Suite 602,
Sarasota, FL 34236
941-217-7024

EMAIL
ZDPrivatewealth@stewardpartners.com
scott.zelniker@stewardpartners.com
molly.townsend@stewardpartners.com
chris.bostick@stewardpartners.com
justin.leins@stewardpartners.com

© 2026 Zelniker Dorfman. All rights reserved.

Securities are offered through Steward Partners Investment Solutions, LLC ("SPIS"), registered broker/dealer, member FINRA/SIPC. Investment advisory services are offered through Steward Partners Investment Advisory, LLC ("SPIA"), an SEC-registered investment adviser. SPIS, SPIA, and Steward Partners Global Advisory, LLC are affiliates and collectively referred to as Steward Partners.