ZELNIKER DORFMAN
PRIVATE WEALTH
AT STEWARD PARTNERS

INDIVIDUALS · FAMILY

Your Life. Your Plan. *Your Future.*

Guidance for every stage of the journey.

Comprehensive wealth management built around real people, your goals, your family, and the life you've worked hard to build.

INSIDE THIS GUIDE

- Why People Come To Us
- Our Team
- Our Services
- How it Works
- Where You Are in life
- Why Zelniker Dorfman Private Wealth

WHY PEOPLE COME TO US

You've Worked Hard. You Have Questions. *We Have Answers.*

Most people don't come to a financial advisor because things are going wrong, they come because things are going right and they want to make sure they stay that way. We hear the same honest concerns from families like yours every day.

RETIREMENT

"Am I saving enough? Will I actually be able to retire when I want to?"

COLLEGE

"How do I help my kids with college without sacrificing my own retirement?"

PROTECTION

"If something happened to me, would my family be okay financially?"

ESTATE

"What happens to everything we've built if something happens to both of us?"

INVESTING

"My money is just sitting in a savings account. Is that a mistake?"

LIFE CHANGES

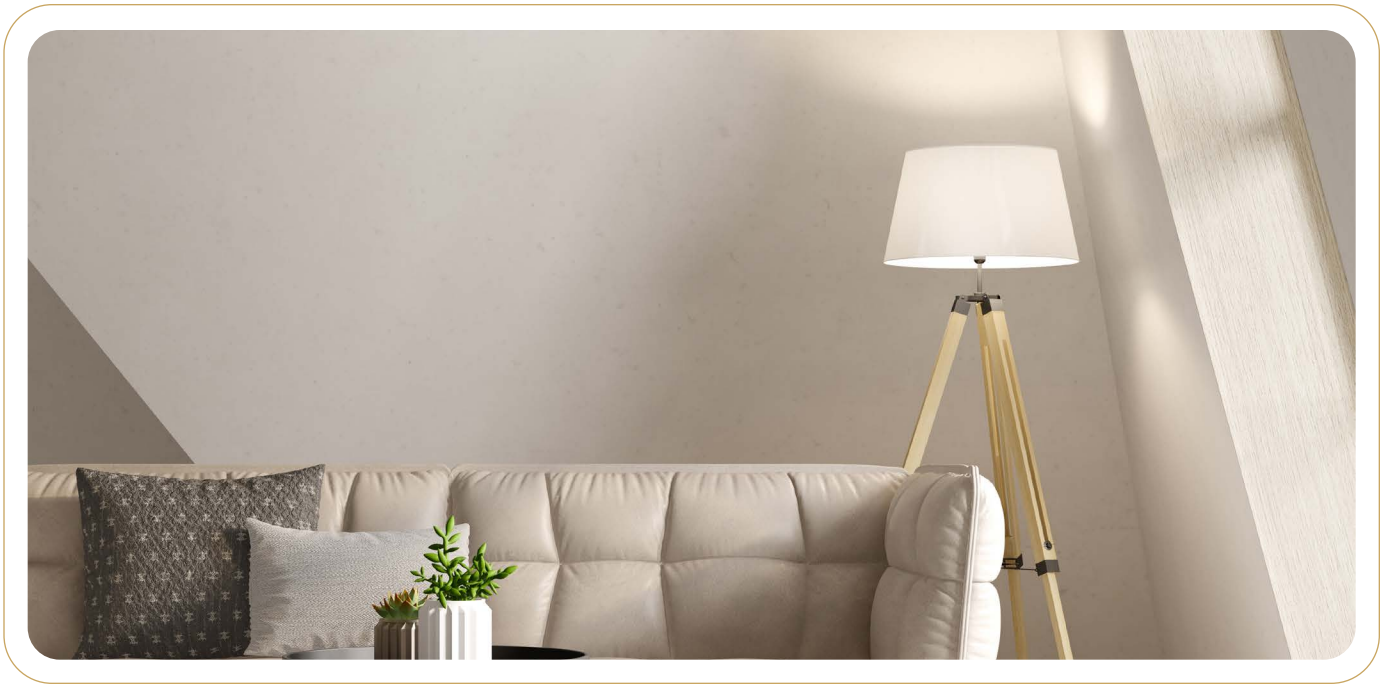
"We just got married / had a baby / changed jobs, what do we need to update?"

TAXES

"I feel like I'm paying too much in taxes, am I missing something?"

CONFIDENCE

"I want to feel like someone is watching over this, not just selling me something."



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 individuals and families.



Scott Zelniker,

CRPC™, CRPS™

Executive Managing Director, Wealth Advisor



Peter Dorfman

Executive Managing Director, Wealth Advisor



Molly Townsend,

CFP®, AIF®

Director, Wealth Advisor



Justin Leins

Managing Director, Wealth Advisor

OUR SERVICES

Everything You Need. *All in One Place.*

We don’t believe in one-size-fits-all portfolios. We help you build comprehensive, coordinated financial plans.

01 Investment Management	Personalized portfolios built around your timeline, risk tolerance, and goals; actively monitored and rebalanced.
02 Retirement Planning	401(k), IRA, Roth strategies, Social Security timing, and income distribution planning so your savings may last.
03 Risk & Insurance Review	Life, disability, long-term care. We evaluate your current coverage and identify gaps before they become problems.





HOW IT WORKS

A Process Built *Around You.*

LISTEN FIRST

We start with a complimentary conversation; no products, no pressure. We want to understand your life, your goals, and what's keeping you up at night.

BUILD YOUR BLUEPRINT

We help you create a comprehensive financial plan that addresses every layer that is important to you, all working together.

PUT IT INTO ACTION

We implement your plan and coordinate with your accountant, attorney, and other professionals so nothing falls through the cracks.

STAY BY YOUR SIDE

Life changes and your plan should too. We meet regularly, monitor your progress, and adjust your strategy as your family grows and evolves.

WHERE YOU ARE IN LIFE

We Meet You Wherever *You Are.*

Financial priorities look different at every stage of life. Whether you're just starting out or enjoying the fruits of decades of hard work, our guidance adapts to you.



Starting Out

Budgeting, debt strategy, first investments, and building the habits that compound over a lifetime.



Growing Family

Life insurance, college savings, home buying, and help you protect the people who depend on you.



Peak Earning Years

Strategies designed to enhance retirement contributions, tax efficiency, long-term wealth accumulation, and business planning.



Retirement Ready

Income distribution, healthcare costs, Social Security timing, and legacy planning done right.

WHY ZELNIKER DORFMAN
PRIVATE WEALTH

The Difference Is in How We *Truly Listen.*

We're not a call center. When you have a question, you reach your advisor, a real person who knows your name and your story. Our relationship-first approach means we're always working in your interest, not ours.

Fiduciary standard: as an advisory client, we are legally obligated to act in your best interest

Independent advice: no proprietary products or hidden commissions

Transparent, straightforward fee structure

Coordination with your existing CPA and attorney

Proactive communication: we reach out to you, not the other way around

Secure online portal: view your entire financial picture anytime

Regular plan reviews and life-event check-ins



ZELNIKER DORFMAN
PRIVATE WEALTH
AT STEWARD PARTNERS

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
peter.dorfman@stewardpartners.com
molly.townsend@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.