



Steve Otten, CFP®, CRPC®

Senior Vice President

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Steve Otten is a Senior Vice President at Seventy2 Capital, where he focuses on assisting clients plan and pursue a predictable retirement income designed to support their desired lifestyle. He draws on over 15 years of industry experience, as well as professional certifications like the CERTIFIED FINANCIAL PLANNER™ certification and Chartered Retirement Planning Counselor designation. Steve employs a comprehensive wealth management approach from asset accumulation, protection, and risk management to tax efficient strategies and legacy planning. He is well versed in alternative investments and non-correlated assets to pursue well diversified investment strategies and work towards his clients' goals.

Prior to joining Seventy Capital, he was a Vice President and Financial Advisor with Merrill Lynch, a Bank of America Company, where he was part of a team serving high-net-worth individuals and families. Steve holds a Bachelor of Science in Economics from the University of Maryland, College Park.

Steve is an active member of his community and is the former President of his hometown Rotary Club. As an avid endurance sport athlete, Steve regularly competes in triathlons and marathons to raise funds and awareness for various charitable organizations including Rotary International, Forum for Equality, Leukemia & Lymphoma Society, Children of Fallen Patriots, Semper Fi Fund, The Arc, and Casa Foundation, among others. He and his wife have one daughter and two dogs and love to travel, hike and spend time with family.

CAR-0323-00381