

HbK HILL, BARTH & KING LLC

Principal Profiles

Stephen C. Schramm, CPA/PFS, CFP®

Principal



Stephen C. Schramm is a Principal in the Hill, Barth & King LLC Stuart office and has been with the firm since 2004.

Graduate of West Virginia University (Bachelor of Science/Accounting) and University of Florida (Masters of Accounting/Taxation), Stephen started his professional career with Arthur Andersen & Co. in Orlando, FL and Denver, CO where he specialized in the real estate, manufacturing and financial institution industries. In 1992, Stephen established a public tax and accounting firm. The firm went on to obtain several multi-million dollar tax-service contracts with the federal government. In 1996, Stephen began emphasizing personal financial advisory services based on the belief that a client's tax and financial issues are interdependent. He believes, and industry experts agree, that the future of the industry is to provide comprehensive services including tax consulting and preparation, investment advisory services and financial planning. Stephen's extensive financial knowledge enabled him to become one of a small group of Certified Financial Planners (CFP®) who is also a Certified Public Accountant/Personal Financial Specialist (CPA/PFS). Stephen enjoys waterskiing, snow skiing, reading, traveling and spending time with his wife, Colleen, and their two children, Maclean and Katie.

Education

- Graduate of West Virginia University (BS) and University of Florida (MA)

Professional/Civic Associations

- Certified Public Accountant; FL
- Certified Public Accountant; CO
- Personal Financial Specialist (CPA/PFS)
- Certified Financial Planner (CFP®)
- N.A.S.D. Series 7, 63 and 65 Exams (Investment Advisor)
- Member, Financial Planning Association
- Member, American Institute of Certified Public Accountants
- Member, Martin County Estate Planning Council
- Past Chairman, Board of Directors for the YMCA of the Treasure Coast
- Member, Florida Institute of Certified Public Accountants
- Executive Committee/Treasurer/Board Member, Economic Council of Martin County

1000 SE Monterey Commons Blvd. • Suite 101 • Stuart, Florida 34996

Phone: (772) 287-4480 • Fax: (772) 288-0371

sschramm@hbkcpa.com • www.hbkcpa.com