At the tender age of 64, not many people are starting up new businesses. But that is exactly what Steve Van Wie decided to do this year, after 14 years as a practicing CFP® (Certified Financial Planner®). Steve and his son Adam, who is registered with the State of Florida as an Investment Advisor, had been working together, and had been discussing the benefits of going independent for quite some time. They found that the more they talked about it, the better the idea sounded. These discussions ultimately led to the formation of Van Wie Financial, a Florida-Registered Investment Advisor.

Steve had also done extensive radio work, and decided that a live weekly radio show would be good for business, as well as being good for listeners. In February, 2015, the Van Wie Financial Hour was created. Steve and Adam can be heard on NewsTalk AM600 and FM100.3, WBOB, every Saturday morning at 10 a.m. With a recent power boost at WBOB, the show can be heard from Daytona to Hilton Head, and is also streamed over the Internet at www.600wbob.com. Podcasts are available on iTunes. The live format encourages people to call the show to get answers to their questions about personal finance and investing. When not answering questions from the public, the show features current information and discussion topics in personal finance.

The best part about going independent, according to Steve, is the ability to control his own destiny and company culture. “My first priority for the startup was that it would be located at the Beach. As a resident of Ponte Vedra since 1992, and of Marsh Landing since 2000, I wanted the office to be convenient, with excellent access and egress for all clients. The final selection of 1538 The Greens Way, just outside the north gate in the Marsh Landing Business Park, was ideal in every respect. The new firm had to adhere strictly to the “fee-only” designation, as well as subscribing to the Code of Ethics for the CFP® Board. As independent, fee-only fiduciaries, Adam and I are obligated to put our clients’ interests ahead of our own, and we sell no products. We also offer a no-cost, no obligation consultation in our office for prospective clients by calling (904) 685-1505 or at www.vanwiefinancial.com.”
Both father and son have technical undergraduate degrees, as well as MBAs. Both have extensive private sector experience, including consulting and business management. “Having been consumers of financial services,” Steve relates, “we understand the point of view of the client, and are able to recommend appropriate solutions for specific client situations.”

The laid back, friendly, “Beach” atmosphere is apparent when you visit the offices of Van Wie Financial. “At the beach” is not merely a slogan; it is a way of life. While it is clear that Steve and Adam do not subscribe to the stiff dress code commonly associated with their line of work, it is also clear that they have a passion for their profession. According to Steve, “Adam and I are determined to make this the friendliest financial firm in the area. We get to know all of our clients on a personal as well as a financial level, and there are a few other things that set us apart. We are the only father-son fee-only financial team in the area (that we know of), and we conduct all of our meetings together. We like to say that you are getting two planners for the price of one, and you get the perspective that comes with that generational age difference.”

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