ZELNIKER DORFMAN
PRIVATE WEALTH
AT STEWARD PARTNERS

FIRM OVERVIEW

Wealth Managed.
Thoughtfully.

A comprehensive wealth management team built to serve individuals, families, and the generations that follow with institutional-grade capabilities and personal attention at every level.

OUR COMMITMENT

"To protect, grow, and transfer wealth with clarity, integrity, and purpose."

OUR TEAM

The People Behind *Every Decision.*



Scott Zelniker, *CRPC™, CRPS™*

Executive Managing Director,
Wealth Advisor



Peter Dorfman

Executive Managing Director,
Wealth Advisor



Jolene Tepedino

Client Services & Operations Director



Justin Leins

Managing Director, Wealth Advisor



Molly Townsend, *CFP®, AIF®*

Director, Wealth Advisor



Ryan Lynch, *CRPC™*

Senior Vice President, Wealth Advisor



Christopher Bostick

Vice President, Wealth Advisor



Nicholas Tejeda

Client Relationship Manager



Jordan Zelniker, *CEPA®*

Wealth Management Associate



Wolf Louis

Senior Registered Client Administrative
Manager



Ryan Armour

Registered Client Administrative
Manager



Emmie Barcomb

Registered Client Administrative
Manager

WHO WE ARE

Built to Serve *for Generations.*

We are a team of credentialed advisors, planners, and specialists united by a single purpose: helping individuals and families build, protect, and transfer wealth across generations. We work as an extension of your life, not just your portfolio.

Fiduciary

As an advisory client, we are legally and ethically obligated to act in your best interest, always. No hidden commissions, no proprietary products.

Independent

As an independent team, we have open architecture access to any investment, product, or solution that best fits your needs.

Comprehensive

From daily cash management to multi-generational estate planning strategies, we manage the full spectrum of your financial life.

Coordinated

We work alongside your CPA, attorney, and other advisors so your entire financial picture moves in one direction.



FAMILIES & GENERATIONAL WEALTH

Wealth Built to Last *Beyond A Lifetime.*

We understand that for many of our clients, the goal isn't just personal financial security, it's building something that endures. We specialize in the complex, multi-generational conversations that most advisors avoid.

From establishing family governance and trust structures to educating the next generation on stewardship, we help families stay together around wealth, not come apart because of it.

Wealth Transfer Planning

Coordinated gifting strategies, irrevocable trusts, and generation-skipping transfer planning designed to minimize estate taxes and maximize what passes to your heirs.

Family Office Resources

Consolidated reporting, bill payment, investment oversight, and advisor coordination; the infrastructure of a family office, without the overhead.

Philanthropic Legacy

Donor-advised funds, private foundations, and charitable trust structures that align your generosity with your values and your tax strategy.

Next-Generation Education

Financial literacy, governance frameworks, and family meeting facilitation to ensure rising generations understand and respect the wealth they will inherit.

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.

The term "Family Office Resources" is being used not to imply that Steward Partners and/or its employees are acting as a family office pursuant to Investment Advisers Act of 1940.

OUR SERVICES

Four Pillars.
One Cohesive Plan.

Every service we offer is designed to work in concert because true wealth management isn't a collection of products. It's a coordinated strategy built around your life.

PILLAR ONE

Personalization

- Strategic business financing
- Succession & exit strategy planning
- Post-liquidity wealth management
- Family office resources
- Access to sustainable & impact investments
- Custom goal mapping & scenario analysis

PILLAR TWO

Investment Management

- Personalized investment management
- Customized asset allocation modeling
- Structured product offerings
- Private equity & private credit access
- Hedge fund access
- Discretionary portfolio management
- Third-party research access
- Cash management & liquidity solutions

PILLAR THREE

Comprehensive Planning

- Comprehensive budget planning & review
- Trust & estate planning strategies
- Education planning
- Philanthropic & charitable gifting
- Wealth transfer & legacy management
- Tax-efficient planning solutions
- Corporate retirement planning
- Cash flow & liability management

PILLAR FOUR

Client Service

- Personal concierge services
- Bill payment & banking support
- Loan & credit coordination
- CPA, attorney & insurance coordination
- Investment banking service access
- Regular portfolio review meetings
- Secure client portal & reporting
- Life-event check-in reviews

A DEFINED FOCUS

Built for Those Who *Expect More.*

Our clients are successful, driven, and often managing more than time allows. They value thoughtful guidance and understand the importance of having the right people in their corner.

We partner with individuals and organizations who are ready to delegate with confidence, knowing that every decision is being handled with care, precision, and intent.

Individuals & Families

Your financial world supports everything that matters most, and it deserves a level of care that reflects that responsibility. We bring structure and coordination to every element, from investments to long-term planning, so your wealth continues to support your family, your priorities, and the future you're building.



Ultra-High-Net-Worth Investors

As wealth grows, so does the need for strategic alignment. Multiple entities, layered tax considerations, and fragmented advisory relationships can quickly create inefficiencies. We serve as the central point of coordination, bringing every moving piece together into a unified strategy designed to preserve, grow, and transfer wealth across generations.



Athletes & Entertainers

High-earning years move quickly, and the decisions made during that time shape everything that follows. We provide the structure and coordination needed to turn your success into long-term stability through thoughtful planning, proactive tax strategy, and a disciplined approach built to last beyond your career.





Business Owners

We approach your business and personal financial life as a unified system; building alignment across tax strategy, investments, and long-term planning as your business evolves, so each decision contributes to strategically prepared outcomes.

Women Investors

Your financial life is shaped by moments that require clarity and direction. We provide a structured approach that adapts alongside you, bringing thoughtful planning and coordination to each stage, so your strategy continues to reflect your priorities as they evolve.

Companies & Organizations

Success today requires more than strong financial performance. Organizations must retain talent, manage capital in uncertain conditions, and support employees facing increasing financial pressure. We bring these priorities into alignment through a coordinated approach that supports both the business and its people.

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
jolene.tepedino@stewardpartners.com

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