Stephanie d'Ippolito, CFP®

DIRECTOR OF FINANCIAL PLANNING

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Stephanie began her career in the financial services industry in 2006 as a sales assistant at A.G. Edwards & Sons. In 2008, Stephanie joined Robert W. Baird, working with the Sales Management team as a Financial Advisor Recruiting and Transition Specialist. Stephanie transitioned back to the client side in 2010 as a Registered Client Relationship Associate. She joined Bronfman Rothschild (previously known as Baker Tilly Investment Advisors) in 2012, initially working as a Client Support Supervisor, then transitioning into the role of Wealth Advisor, where she focused on providing comprehensive financial planning advice to high net worth individuals and families.

At Freestone, Stephanie is responsible for supporting our Client Advisor team by providing comprehensive financial planning solutions for our clients. This includes drafting and updating written financial plans, analyzing unique situations such as estate distributions, insurance needs, and corporate benefits, and updating the Client Advisor team regarding changes in tax or estate law that may impact our clients. Stephanie enjoys working with clients to ensure they are on track to meet their financial and personal goals, and with the Client Advisors to implement the appropriate action steps.

Education

Stephanie earned a BA in Criminology and French from Indiana University of Pennsylvania. She also earned a Certificate in Financial Planning from DePaul University, and holds the CERTIFIED FINANCIAL PLANNER™ (CFP®) designation.

Outside Freestone

Stephanie loves to spend time with her husband and their two pugs. She also enjoys traveling, cooking, wine, and yoga.