



Steve Taber is a veteran of the financial services industry where he has enjoyed working in various leadership capacities from the distribution side to the executive management area. These roles included working for two major Wall Street-based firms as one of its Estate Planning Specialists as well as in a management role reporting to the Senior management team.

#### PROFESSIONAL HIGHLIGHTS

In 2005, Steve founded Mercury Financial Group, a national advisory firm that works with top Wall Street firms, as well as banks, broker/dealers, accounting firms, family offices and other financial institutions.

In June 2020, Lion Street acquired Mercury and brought Steve on board to run their new business unit, Lion Street Private Client Group, focusing on the space where Mercury had excelled. Lion Street's goal and mission is to build the elite team in the industry serving financial advisors and their HNW & UHNW clients.

Steve is married to Kristin and they reside in Dallas with their 5 children. The family spends their summers in Telluride, CO as often as they can.



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*Securities offered through Lion Street Financial, LLC., Member FINRA & SIPC.*

Lion Street Private Client Group is comprised of an elite national network of planning specialists in the major U.S. wealth markets. We partner with financial advisors and professionals to provide sophisticated planning solutions, business and estate planning strategies, charitable planning, and specialized expertise focused on helping high-net-worth and business clients succeed.

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