



JOHN M. STERN, JR.

CPA/PFS

PARTNER, INVESTMENT ADVISOR

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☎ 410-546-5600

John is a Certified Public Accountant and Personal Financial Specialist that has been a part of the firm since its inception in 1999. Best described as energetic, enthusiastic and passionate, John loves what he does for a living. When asked what he enjoys most, his answer is simple – “it’s a people business not just numbers.”

Originally from Baltimore, MD, John moved to Salisbury in 1985 and joined PKS & Company, P.A. He became a Partner in 1988 and was the firm’s Managing Partner for more than a decade. John’s willingness to help people is evident in his involvement throughout the community, serving on countless nonprofit committees and boards. John lives in Salisbury with his wife Dawn and has six children. Outside of work John enjoys spending time with his family, fishing and traveling.

AREAS OF PRACTICE

- Accounting
- Business Succession Planning
- Financial Planning
- Higher Education Planning
- Investment Planning Strategies
- Mergers & Acquisitions
- Retirement Income Planning
- Small Business Planning
- Social Security Planning
- Tax Planning

PAST & PRESENT COMMUNITY SERVICE

- Wicomico Rotary Club – Member, President
- Tidal Health Foundation – Board Member
- Community Foundation of the Eastern Shore – Board Member
- Greater Salisbury Committee – Board Member
- Salisbury Area Chamber of Commerce – Member, Board Member
- Salisbury Wicomico Economic Development – President
- YMCA, Life Crisis Center, Greater Salisbury Committee, Wor-Wic Foundation – Past Board Member
- Maryland Association of Certified Public Accountants

EDUCATION

- B.S. in Accounting
- Loyola University Maryland, Baltimore, Maryland

CERTIFICATIONS

- Certified Public Accountant
- AICPA Personal Financial Specialist
- Registered Investment Advisor

PROFESSIONAL AFFILIATIONS

- American Institute of Certified Public Accountants
- Maryland Association of Certified Public Accountants