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SteinbergAnna Invests In Clients, Community



By **Jane Law**
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Three key points that the minds at SteinbergAnna Wealth Management Corporation teach clients are knowledge, discipline and patience. They do it while walking clients through a step-by-step process in developing a customized financial program.

“We truly believe that you have to the knowledge to understand what you’re doing, [but] you have to have discipline to stick to your game plan and you have to have the patience to let things work themselves out,” Kenneth C. “KC” Anna, a co-partner, said. “Building relationships in which people can trust you is the foundation of business — our business.”

Anna and co-partner Daniel Steinberg, both Huntington residents, have been working together for the past 26 years. Their Huntington-based business is now coming up on its 10-year anniversary.

It offers private, customized, total

wealth management for individuals, businesses and charities.

Whether it’s insurance, retirement, investments or something else, Steinberg said, they want to be the go-to source for clients.

“We want to be that first call for everyone to help them with financial questions and strategies,” Steinberg said. “A lot of the answers we know ourselves but if we don’t, we will point you in the right direction.”

Anna said their securities and advisory services are offered through Holbrook-based American Portfolios Financial Services, Inc., a full-service broker/dealer and registered FINRA/SIPC member firm that supports independent financial professionals in private practice.

“Steinberg and Anna are two of the most professional financial advisors that I have encountered in my 42 years in our industry,” Frank Tauches, executive vice president and general council of American Portfolios, said. “They are extremely conscientious, they place the needs of their clients first in all situations and are in all respects a pleasure to deal with.”

Steinberg and Anna first met in 1991 in a training program at an investment bank on Wall Street in Manhattan and then began working as partners in 1998. The duo moved out to Long Island in 2007 to start up Steinberg Anna in Huntington.

Long Islander News photos/Jane Law



Daniel Steinberg and Kenneth C. “KC” Anna have been working together in the finance industry for the past 26 years and are coming up on their business’ 10-year anniversary.

Their 1,000-square-foot office at 76 New York Ave. overlooks Huntington Harbor.

“We have a very good working relationship and I think that we both are morally sound people to have worked very well together and being entrenched in the community together and I think it goes a long way,” Steinberg said. “We have a very fruitful relationship.”

Originally from Boston, Steinberg graduated from Bowdoin College with bachelor’s degree in history in 1987. He said he enjoys the independence of being his own contractor. He also loves “being able to help people.

“I think is very rewarding.”

Anna added that “if you get to the point in your relationship where the client can trust you with their financial well-being, that’s a powerful place to be.”

Originally from upstate New Hartford, Anna’s drive for finances began when he was in fifth grade and was tasked with following the IBM stock

every day for a project, he said. Anna went on to graduate from Marist College in Poughkeepsie with a bachelor’s degree in finance in 1990.

Both Steinberg and Anna are married with children and are active members of the community. Steinberg coaches soccer for the HBC Club team, and Anna coaches lacrosse and soccer at St. Patrick’s School and basketball for St. Patrick’s SYO. Anna is also a volunteer firefighter for the Halesite Fire Department.



Huntington-based SteinbergAnna Wealth Management Corporation is coming up on its 10-year anniversary.

SteinbergAnna Wealth Management Corporation

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