

Media Kit For:

Stephen H. Wagner, CFP®, CEPA®

CEO of Integrity Wealth Advisors



Integrity
Wealth Advisors



Stephen H. Wagner, CFP®, CEPA®

CEO, Integrity Wealth Advisors

A Leading RIA Firm in Southern California



FACTS



YEARS OF EXPERIENCE

30+



ASSETS MANAGED¹

\$274M



YEARS OF PODCASTING

5+

TOPICS

- For **Business Owners**: Exit Planning Challenges & Opportunities
- For **High-Bracket Taxpayers**: Tax Strategies Your CPA May Be Missing
- For **Major Donors**: Often-overlooked Giving Strategies Allowed by the IRS
- For **Retirees**: Portfolio Positioning For Each Stage of Life

QUESTIONS

- Why you should make charitable giving part of your financial plan?
- How can you balance financial goals and philanthropy?
- How can an owner plan for sale of business?
- When should you start planning for retirement? Is it too late?
- What are the most common estate planning errors people make?



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Integrity Wealth Advisors is a Registered Investment Advisor. 1 Assets under management as of 12/31/2024, as filed in the firm's annual ADV disclosure.



Welcome to Integrity Wealth Advisors

Integrity Wealth Advisors (IWA) was founded by Stephen Wagner based on a philosophy integrity, data driven strategy, and client focused operations. We are committed to striking the right balance between risk and return through managing global, multi-asset class investment portfolios.

About Integrity Wealth Advisors



With downtown offices in both Ventura and Ojai California, IWA is a Registered Investment Advisory (RIA) firm with over \$274 million in assets under management.¹ The team includes 3 advisors and 8 support staff.





Stephen Wagner, CFP® CEPA®
Certified Financial Planner®
Certified Exit Planning Advisor®
CEO & Investment Advisor



Laine Miller, CFP®
Certified Financial Planner®
Investment Advisor



Doug Ecker, CRPS®
Chartered Retirement Plan Specialist®
Investment Advisor



Sharon Medina, FPQP®
Financial Paraplanner Qualified Professional®
Operations Manager



Bob Cheatham, CRPS®
Chartered Retirement Plan Specialist®
Director of Strategic Marketing



Cindy Rodarte, FPQP®
Financial Paraplanner Qualified Professional®
Ojai Branch Manager



Jessica Hawley, FPQP®
Financial Paraplanner Qualified Professional®
Ventura Branch, Client Services



Gavin Jamroz, FPQP®
Financial Paraplanner Qualified Professional®
Financial Paraplanner



Kara Morison
Client Experience Coordinator



Sarah Waters
Client Services



Michelle Vidales
Client Services

Steve's Long Biography



Stephen H. Wagner, CFP®, CEPA® and CEO of Integrity Wealth Advisors, is a Certified Financial Planner® committed to helping clients achieve financial independence. Steve lives with his wife and dog in Somis, California, and has resided in Ventura County for most of his life. With a deep-rooted passion for helping individuals and businesses grow, preserve, and distribute wealth, Steve has built a firm that reflects his unwavering dedication.

Under Steve's leadership, Integrity Wealth Advisors has expanded over the years to include two locations in downtown Ventura and Ojai, California. With a team of four devoted financial advisors and five dedicated staff members, Integrity Wealth Advisors embodies a collective mission to provide noteworthy financial guidance.

Recognized for his expertise in the field, Steve has established himself as a trusted fiduciary, consistently acting in the best interests of his clients. He believes in maintaining the highest standards of integrity and takes great pride in working towards meeting every client's unique financial needs with personalized solutions.

In the past, Steve served as a respected business instructor at Ventura Community College, where he nurtured the minds of aspiring entrepreneurs and finance enthusiasts. Drawing from his extensive experience and industry insights, he imparted valuable knowledge to his students, helping to equip them with the necessary tools to succeed in the ever-evolving financial landscape.

Beyond his dedication to financial planning, Steve enjoys pursuing his passions outside of work. He is an avid golfer, relishing the opportunity to hit the links and challenge himself on the course. Additionally, he finds fulfillment in exploring new destinations through his love for travel, seeking out enriching experiences and broadening his horizons.

With Steve Wagner at the helm, Integrity Wealth Advisors helps clients navigate the complexities of wealth management and attain their long-term financial goals.

Steve's Short Biography

Stephen H. Wagner, CFP®, CEPA®, is CEO of Integrity Wealth Advisors, a fiduciary firm dedicated to helping clients achieve financial independence. Based in Ventura County, California, where he has lived most of his life with his wife and dog, Steve has built a firm that reflects his passion for helping individuals and businesses grow, preserve, and distribute wealth.

Under Steve's leadership, Integrity Wealth Advisors has expanded to include two locations in downtown Ventura and Ojai, with a team of four financial advisors and five staff members. Recognized as a trusted fiduciary, Steve consistently acts in clients' best interests while maintaining the highest standards of integrity. He previously served as a business instructor at Ventura Community College and enjoys golf and travel in his free time.

Steve's Micro Bio

Stephen H. Wagner, CFP®, CEPA®, and CEO of Integrity Wealth Advisors, is a Certified Financial Planner® committed to helping clients achieve financial independence. He has been working with individuals, families, and businesses to achieve their retirement planning goals for over 30 years. He serves as the principal Certified Financial Planner® at Integrity Wealth Advisors and specializes in retirement income planning and tax reduction strategies as well as exit strategies.

Timely Topics Steve Addresses

Recent Market Insights & Outlook

The Pitfalls of Emotional Investing

The Benefits of Robust Financial Planning

When ROTH IRA Conversions Make Sense

Exit Planning For Business Owners

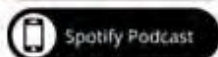
Why Good Estate Planning Is So Critical

Date: 9/10/2025

Host: Roger Silk

Topic: Exit Planning For Business Owners

Link: <https://open.spotify.com/episode/6wBkV7PI0ffkpjgVSYkd8?si=zVsDfDOAROWDMIwu43HVSg>

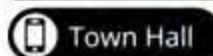


Date: 9/12/2025

Host: Stephen H. Wagner

Topic: Behavioral Investing

Link: <https://youtu.be/B7Knz2mFXFg>



Date: 9/24/2025

Host: Stephen H. Wagner

Topic: Interview with Anne Paul King, President of Ventura College Foundation

Link: https://youtu.be/_JQ3hXVtoKA



For bookings, contact Bob Cheatham: bob@iwaplan.com or 805-339-0760.