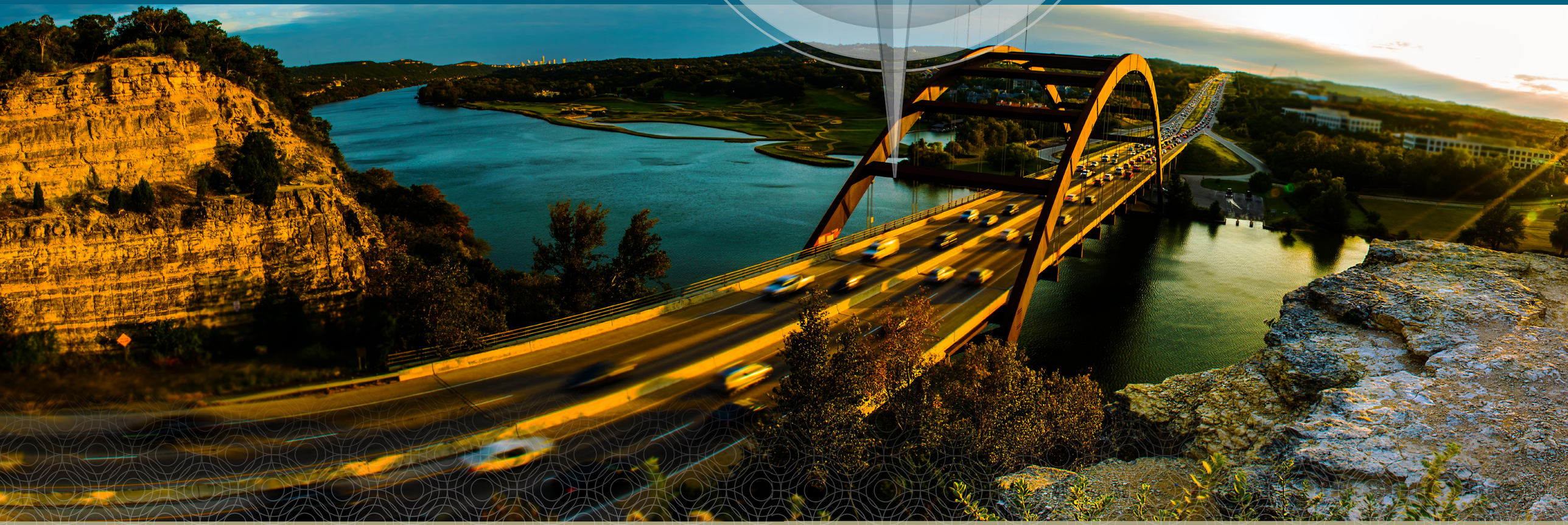
CFP

NAPFA
Registered Financial Advisor

FEE-ONLY | INDEPENDENT | FIDUCIARY



www.StoneWealthATX.com

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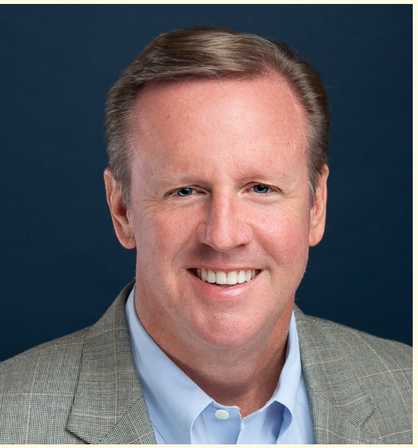
STONE
WEALTH MANAGEMENT

Our Founder



W. Morgan Stone
CFP®, MBA

Morgan is a CERTIFIED FINANCIAL PLANNER™ practitioner with experience in the financial services industry since 1994. He is the founder of Stone Wealth Management, a Fee-Only Registered Investment Advisor* firm.

Morgan graduated from Vanderbilt University in 1992 and completed the Texas School of Trust Banking in 1996. He earned an MBA with a Personal Financial Planning concentration from St. Edward's University in 2003 and completed the Financial Planning Association Residency Program at DePaul University in 2004. Prior to founding Stone Asset Management, Morgan was Vice President of Austin Trust Company.

Morgan is a Registered Financial Advisor with the National Association of Personal Financial Advisors (NAPFA), is a member of the Financial Planning Association and is active in the Estate Planning Council of Central Texas, where he has served in several board positions. He has also served on the Board of Directors of the Juvenile Diabetes Research Foundation and the Stephen F. Austin High School Continuing Education Foundation.

Morgan's trust and estate experience makes him especially well-suited to sophisticated clients. He specializes in complex financial questions and often works with small business owners and High Net Worth families.

Our Financial Services

Everyone has different needs when it comes to their finances, and we offer two service models:

Wealth Management

Our Wealth Management service includes the creation of an individualized investment strategy, paired with ongoing financial planning. As our premier service, Wealth Management is a long-term relationship designed to grow and change with your financial needs.

Financial Landscape Analysis

We also offer Financial Planning as a stand alone service to help clients answer specific questions. This service is flexible, and can be tailored around the needs of the client.

** Registration does not imply a certain level of skill or training*

Meet Our Team

Kacie J. Swartz
CFP®, CIMA®

Kacie Swartz has been helping individuals and families pursue financial independence as a CERTIFIED FINANCIAL PLANNER™ practitioner since 2012. Originally from Kansas, Kacie graduated from Wichita State University in 2003 with a degree in Finance.

Kacie uses her years of experience constructing advance portfolios as a Certified Investment Management Analyst® to help others understand their investment options. She is an advocate of socially responsible investing and a frequent public speaker promoting financial literacy and educating investors about sustainable investing. Her background in investment education makes her a good fit for clients broadening their knowledge of financial planning and investments and helping people through major life changes like ending a marriage or losing a spouse.

Kacie is a member of the Financial Planning Association, the National Association of Personal Financial Advisors (NAPFA), the Investments & Wealth Institute, and is a spokesperson for the CFP® board's Women's Initiative to attract women to the financial planning profession.

Antonio Tovar

Antonio is a graduate from Texas Tech University with a bachelor's degree in Personal Financial Planning. He started his financial career working for Charles Schwab & Co as a broker, facilitating trades and assisting with account support.

Antonio serves as an associate advisor, providing support in financial planning projects and researching different areas of interest that are impactful to creating a financial plan

Brittany McGehee has been with Stone Wealth Management since 2010. She currently serves as the Chief Compliance Officer and COO. **Kelly McCune** joined the firm in 2016 and serves as the firms Client Service Coordinator. She works closely with Client Service Associate, **Patricia Espino** both of which are the main point of contact for client onboarding and account maintenance. Brittany, Kelly, and Patricia are graduates of the Texas Tech Financial Planning program.

Brittany McGehee

Kelly McCune

Patricia Espino

STONE
WEALTH MANAGEMENT

STONE WEALTH MANAGEMENT PROCESS

Discovery Meeting

Detailed discussion of your priorities, objectives and concerns. In depth review of our wealth management process.

Investment Plan & Mutual Commitment

Detailed review of our investment reccommendations and your total client profile. Formalize engagement and collaborate on transition plan.

Onboarding & Implementation

Review your implementation plan and account transfer status.

The Advanced Plan

Through consultation on entire range of financial needs. Establish action plan to address your priorities.

Regular Progress Meetings

Periodically assess your progress toward accomplishing goals. Identify and address new issues.

The Professional Network

Our team of carefully selected attorneys, CPAs, insurance agents and other professionals each with expertise and experience in key financial areas.

Professional Network Meeting

Incorporate appropriate specialists into Advanced Plan to evaluate and construct appropriate solutions.

Who We Are

We are Fee-Only advisors

That means that we don't have hidden fees or sell any products which pay commissions. We are committed to transparency in all our relationships

We are Independent

Established in 2004 by Morgan Stone, we are an independent Registered Investment Advisory* firm. As an independent firm, we are free from conflicts of interest associated with proprietary financial service firms.

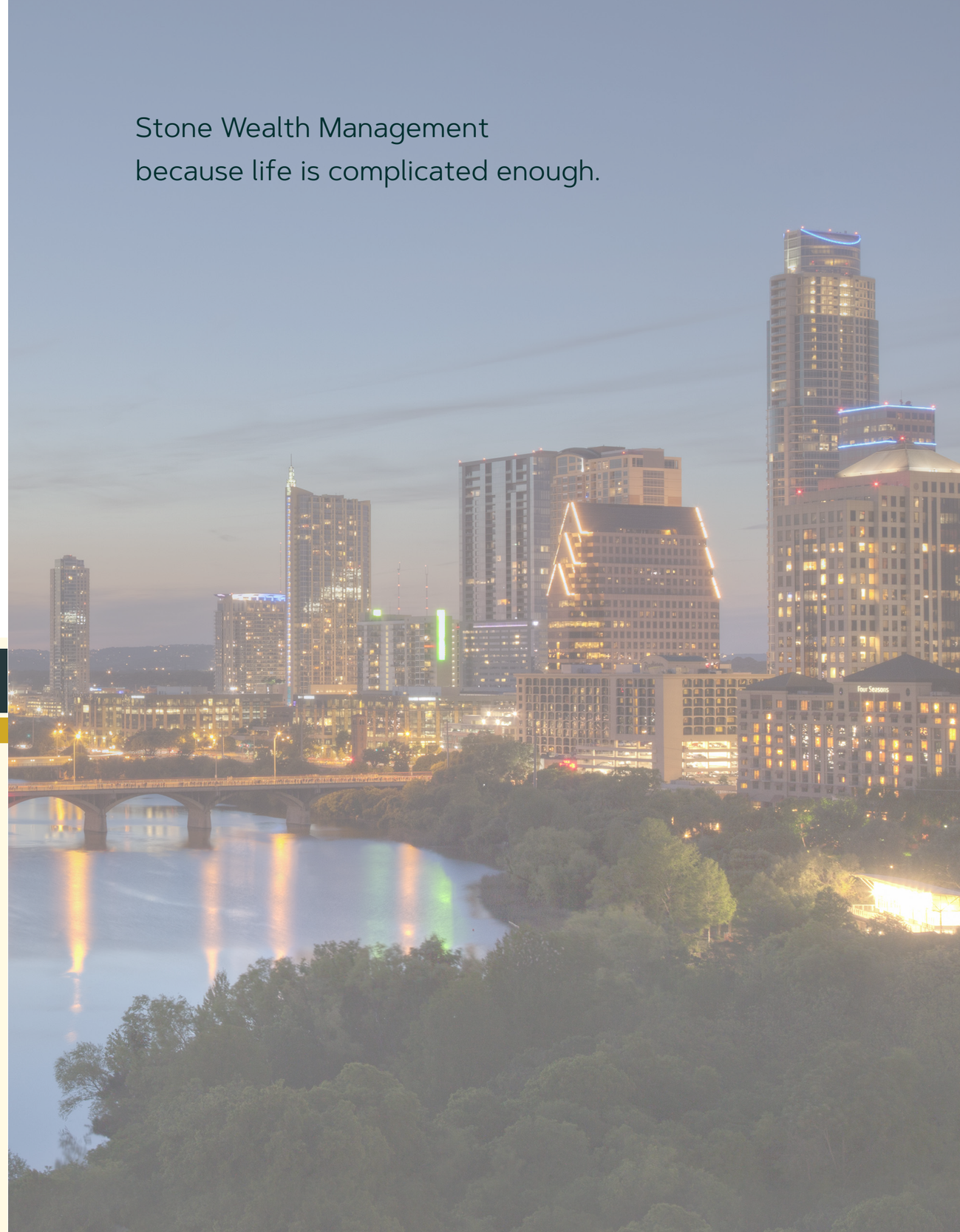
We are a Fiduciary firm

We embrace a fiduciary obligation to our clients, committing to put your interests first, over and above our own.

We are CERTIFIED FINANCIAL PLANNER™ professionals

The CFP® certification is recognized as the highest standard in personal financial planning.

**registration does not imply a certain level of skill or training*



Stone Wealth Management
because life is complicated enough.