

## NEWS



FOR IMMEDIATE RELEASE

**Press contact:**

Leesy Palmer

Impact Communications, Inc.

913-649-5009

[LeesyPalmer@ImpactCommunications.org](mailto:LeesyPalmer@ImpactCommunications.org)

### **Stone Wealth Management Announces CFP® Marks for Team Member, Recognition on Two Top Advisor Lists, and Expansion of Team**

*Austin-based wealth management firm adheres to fiduciary standards, always keeping the needs of clients first*

AUSTIN, TX [May 13, 2022] – [Stone Wealth Management](#), an independently-owned and operated financial planning and SEC Registered Investment Advisory firm, today announced that wealth advisor Antonio Tovar has been approved to use the CFP® mark of distinction. In addition, the firm was named to a list of top financial planning firms in Austin, and has added new Austin native to the firm.

#### **CERTIFIED FINANCIAL PLANNER® DESIGNATION FOR ANTONIO TOVAR**

A native Austinite, Antonio Tovar, Wealth Manager, passed the CFP Board Exam and received approval to use the CFP® mark of distinction in January 2022. Tovar specializes in working with young executives/professionals with executive perks and equity compensation. A graduate of Texas Tech with a B.S. in Personal Financial Planning, Tovar previously worked as an Active Trader Broker at Charles Schwab before joining the firm. He previously participated in organizations such as Toastmaster’s International, where he refined his skill in public speaking. Additionally, he has spent time volunteering at the Central Texas Food bank and is looking for more community service opportunities.

“I’m proud to have earned the distinction of Certified Financial Planner which further solidifies the standards of excellence and fiduciary commitment we have to our clients at Stone Wealth. As an SEC Registered Investment Advisory firm, we have a fiduciary obligation to our clients, committing to put their interests first, over and above our own,” said Tovar.

“We are delighted that Antonio has earned his CFP® designation, one of the most highly regarded designations in our field,” said Morgan Stone, CFP®, CEPA, President of Stone Wealth

Management. “He has also continued to broaden his areas of expertise, especially in executive compensation and taxation. He has become a valued member of the team,” said Stone.

## **DOUBLE LOCAL RECOGNITION FOR THE FIRM**

Recently, Stone Wealth Management was ranked in the Top 40 Financial Advisors in Austin on [Expertise.com](http://Expertise.com) out of 213 local firms. Stone Wealth received scores of A+ for professionalism and A for reputation. Expertise.com scored Austin financial advisors on more than 25 variables across five categories and analyzed the results to provide a hand-picked list of advisors.

Additionally, Stone Wealth Management was selected as one of the Top 9 Financial Advisors in Austin by [AdvisoryHQ](http://AdvisoryHQ). According to AdvisoryHQ: “While Stone Asset Management, Inc. may be among the smallest firms on our list of top-rated Austin financial advisors, this financial planner offers an excellent depth of financial management expertise while providing maximum value to their clients.”

## **NEW FINANCIAL PLANNING PRACTITIONER**

Austin Hilscher recently joined the Stone Wealth team. Hilscher is a graduate of Texas A&M with a B.S. in Economics. He previously worked as an intern and Assistant Paraplanner at a local Austin financial services firm where he assisted in the creation of financial plans and served on the client service team. Hilscher grew up in the area and attended Round Rock High School. At Stone Wealth, Hilscher serves as an Associate Wealth Manager, providing financial planning support and research.

## **ABOUT STONE WEALTH MANAGEMENT**

Established in 2004 by Austin native Morgan Stone, Stone Wealth Management is an SEC Registered Investment Advisory and financial planning firm. An independently owned and operated firm, the company’s financial advisors are free from conflicts of interest that are often associated with large financial services firms that have a self-interest in promoting commission-based and/or proprietary products. The firm works on a commission-free basis and has a fiduciary obligation to its clients, which means that they must put their clients’ interests first, over and above their own. For more information, visit [www.stonewealthatx.com/contact-us](http://www.stonewealthatx.com/contact-us).

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