

NEWS



FOR IMMEDIATE RELEASE

Press contact:

Leesy Palmer

Impact Communications, Inc.

913-649-5009

LeesyPalmer@ImpactCommunications.org

Austin-Based Stone Wealth Management Opens New Office, Makes Top Advisor List, Hones in on Specialties and Adds Staff

Fiduciary standards and commission-free services have helped the firm attract new clients and add new positions for financial planning professionals from Texas Tech

AUSTIN, TX [May 11, 2021] – [Stone Wealth Management](#), an independently-owned and operated financial planning and SEC Registered Investment Advisory firm, today announced they are now situated in their new office space at 4210 Spicewood Springs Rd, Bld. E in Austin, TX. The new office space will allow the firm to add more staff, host more events, and meet client demands. In addition, the firm was named to a list of top financial planning firms in Austin, specialties have been declared, and a new graduate of Texas Tech’s Personal Financial Planning program has joined the firm.

NEW OFFICE EXPANSION

“After experiencing tremendous growth over the last few years, we realized we needed a larger space to better serve our clients and help them reach their financial goals,” said Morgan Stone, CFP®, CEPA, President of Stone Wealth Management. The new office is more than double the previous space at 4000 square feet, with conference areas that allow for remote or in person meetings. The office is centrally located in Northwest Hills, conveniently placed between MoPac and TX-360. “The office is part of the Spicewood Summit office park with onsite parking and is strategically located across the street from Torchy’s Tacos for a post-meeting taco,” said Stone.

When local restrictions lift this fall, the firm looks forward to hosting an Open House for clients and business colleagues. Anyone else interested in attending is invited to contact the office to be added to the invitation list.

LOCAL RECOGNITION FOR THE FIRM

Recently, Stone Wealth Management was ranked #10 on [The List: Austin-area financial planning firms](#) by the Austin Business Journal (ABJ). The 2021 Austin Business Journal list of financial planning firms included financial advisory businesses with offices in the Austin area, including Travis, Williamson, Hays, Bastrop and Caldwell counties. The list was ranked by the number of CERTIFIED FINANCIAL PLANNER™ practitioners (CFP®) in the Austin office and ties were broken by the total number of certified professionals handling financial planning for clients. Data was gathered via ABJ surveys sent to company representatives. Only firms that responded to requests for information were included.

SPECIALISTS RISE TO THE OCCASION

Each of the financial planning professionals at the firm has declared a specialized niche. “Our team members have developed skills that make them uniquely qualified to focus on specific client needs,” said Stone. “Having three special lines of focus helps us to provide the in-depth knowledge needed to address the specific issues our clients bring to us.”

Stone, who has a background in trust and estate planning, specializes in helping high net worth clients with estate planning and gifting issues, multi-generational legacy planning, and risk management. A native Austinite, he specializes in complex financial questions and often works with small business owners on their retirement planning, continuity planning, exit planning and succession planning. Stone has been quoted in several publications including *InvestmentNews*, *Newsweek*, *BusinessWeek*, and *Financial Planning* magazines.

Kacie Swartz, CFP®, CIMA® and Senior Wealth Manager, focuses on helping people who are moving through a major life transition such as death of a spouse, divorce or career change. Swartz also is knowledgeable in Environmental, Social and Governance (ESG) focused investing, as well as Social Security claiming strategies. Swartz was recently featured in an article, [Kids and Money, Earth Day, Spring Cleaning and ESG Investing](#), where she said that investors, if they wanted to tilt toward clean energy and environmental impact, could be just as successful using an ESG strategy as with a more traditional investment strategy.

Alex Garcia, CFP® and Wealth Manager is well-versed in executive compensation planning, working closely with clients who have stock options and deferred comp to manage. A graduate of Texas Tech University with a B.S. in Personal Financial Planning, Garcia’s past experience working with a team that developed online practice management platforms for other financial advisors gives him a solid understanding of SaaS work environments. He marries that with his financial planning credentials to provide advice to young professionals who have just entered their peak earning years.

NEW FINANCIAL PLANNING PRACTITIONER

The firm has recently added Antonio Tovar, a graduate of Texas Tech with a B.S. in Personal Financial Planning. Also a native Austinite, Tovar previously worked as an Active Trader Broker

at Charles Schwab before joining the firm. “I’m thrilled to be the latest Texas Tech graduate to join the Stone Wealth team,” said Tovar. “My colleagues at Stone Wealth have set a high bar in specialization. I’m eager to learn where my skillset best benefits our clients and the team.” Tovar has recently passed the CFP® exam and is completing his experience requirement before using the certification. He will serve as an Associate Wealth Manager to support the firm as it grows, while developing his planning specialization.

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.

###