

Stone Wealth Partners Celebrates Its First Anniversary With Continued, Client-Inspired, Growth

Partners, Alex Hebert and Beau Wiltz, attribute Stone Wealth Partners' growth to their client-centric and proactive approach to customize financial strategies.

NEW ORLEANS , LA, UNITED STATES , November 3, 2021 /EINPresswire.com/ -- Celebrating the first anniversary of their firm, founders Alex Hebert and Beau Wiltz attribute the success of [Stone Wealth Partners](#) to their client-directed passion, diligence, and experience. By being proactive in their approach to financial and investment advice, business evaluations, employer insurance, and discretionary management, among other offerings, the firm continues its growth.



Stone Wealth Partners is an independently owned investment advisory firm with a solid history of providing dedicated, personalized service to our clients.

Hebert explains the firm's client-centric approach, "We take our time to design individual financial paths for each institution, business, and person, so that each client can meet their long and short-term financial goals. No one strategy fits everyone. That's why every client gets our undivided attention—from planning to execution to follow-up. Our proactive approach is to utilize the most efficient methods available to develop a strategy that addresses each client's unique financial goals and objectives".

While working as financial advisors at bank in Lafayette, Louisiana, Hebert and Wiltz noted their shared vision to provide community-driven, client-adaptive financial advice. They opened Stone Wealth partners in 2020 to establish an environment for asset management, financial planning, and client services that include room for the kind of creativity that generates personal and firm-wide productivity.

Whether their clients require detailed individual retirement planning or advanced accounting and business taxation strategies, Stone Wealth Partners has the experience and the resources to meet each need. The firm offers individuals financial advice, investment advice, Roth Conversions, Collateralized Investments, Discretionary Management (common stocks, preferred stocks, futures contracts, exchange-traded funds, options, cryptocurrency, mutual funds, and fixed-income investments through TD Ameritrade) and Investment/Retirement Income. For their Business Partners, Stone Wealth Partners offers Employer-Sponsored Retirement Plans (401(k), 403(b), 401k/IRA Rollover, Roth IRA, Traditional IRA's, Roth IRA Conversions), business evaluations, and advice based on each company's structure, operations, and maintenance.



ALEX HEBERT, PARTNER

"Trust is one of the single most important things to our philosophy," says Hebert. "At Stone Wealth, we know that trust is earned and that's why we are committed to our personal relationships." Offering diversified financial resources and unbiased advice, Stone Wealth Partners strives to foster financial growth for its clients. "We

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Beau Wiltz

are here to help our clients get to their destination from whatever stage of life they're in, whether their goal is to buy a home, save for education expenses, or retire," Wiltz adds. "We are committed to learning and understanding our clients' long-term goals, and to helping them develop, implement, and monitor a successful financial strategy. We also take the time to fully explain our financial recommendations."

Stone Wealth Partners LLC (CRD# 308429) is a financial advisory firm headquartered in Lafayette, LA. They manage

over 40 Million in 361 accounts and serve clients' financial needs across four states (or territories). For additional information regarding Stone Wealth Partners, call (337) 660-2334 or visit stone-wealth.com.

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BEAU WILTZ, PARTNER

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