Steward
WEALTH MANAGEMENT

Difference
Fiduciary (/Fiduciary)
One Team (/Oneteam)
Goal Based (/Goalbased)
Nobel Prize (/Nobelprize)
Personalized (/Personalized)
Philanthropy (/Philanthropy)
About Us
Our Team (/Our-Team)
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Offering Peace Of Mind

So you can focus on the things that matter most.

The Steward Difference

(/fiduciary)

(/oneteam)

FEE ONLY FIDUCIARY

We are independent, fee-only advisors who have accepted the Fiduciary standard for our clients. We have a legal responsibility to place your interest before our own. We work for you and are compensated only by you. We do not receive commissions or incentives for the investment advice we provide.

TEAM APPROACH

Each client is assigned a team of experienced professionals including a CPA, investment advisor, and estate planning attorney that work together continually addressing each component of the wealth plan. These coordinated services are included within our standard fee.

(/goalbased)

GOAL BASED PLANNING

Our planning starts with a written, goal-based plan. We discover your financial goals, then construct a wealth plan as a pathway to achieving those goals, only then will we invest your money. This plan will be our roadmap to ensure we are staying on course to achieve your goals.

(/nobelprize)

NOBEL PRIZE

Our investment philosophy is backed by more than fifty years of academic research and Nobel Prize winning theory. We see markets as an ally, not an adversary. Rather than wasting time trying to discover ways markets are mistaken, we take advantage of the ways they're right.

(/personalized)

PERSONALIZED SERVICE

We intentionally limit our number of clients so we are able to provide attentive and proactive service. This approach allows us to have multiple face to face meetings with you annually. It also allows us to anticipate life style changes and customize the financial plan throughout the year.

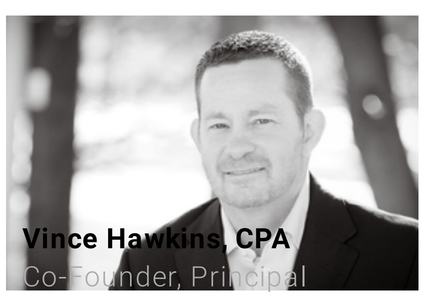
(/philanthropy)

PHILANTHROPY

We understand the techniques of charitable giving, both basic and sophisticated, and will work with you to evaluate the best approach for meeting your charitable objectives and achieving the most tax savings.

Experienced Team

Dustin Stiefel
Co-Founder, Principal
(/stiefel)



Vince Hawkins, CPA
Co-Founder, Principal
(/hawkins)

Joseph McIntosh, CPA, CKA

Investment Advisor

(/mcintosh)

Steven Early, J.D. CFP

Estate Planning Attorney

(/early)

Patrick McKinley, CPA

Certified Public Accountant

(/mckinley)

Steve Hutchings, CPA

Certified Public Accountant

(/hutchings)

Dale Mason CBC, SGS

Health Insurance Specialist

(/mason)

CFP CERTIFIED FINANCIAL PLANNER

CPA

Let's Talk

LET’S TALK

Whether you have a specific question or are just curious about how we might be able to help you, please fill out the form below and we will contact you soon.

Name *

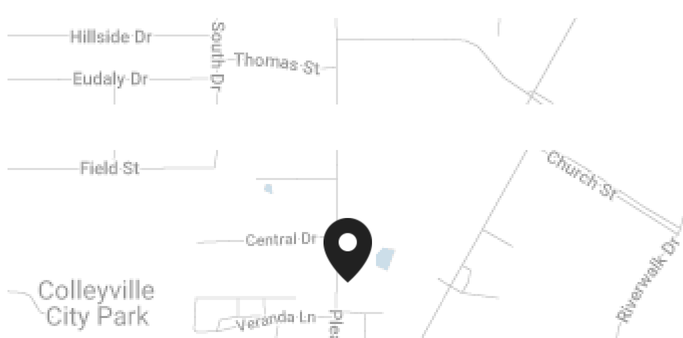
First Name

Last Name

Email Address *

STEWARD WEALTH MANAGEMENT

26 Main Street
Colleyville . TX . 76034
817.428.1145
mail@stewardwealthmanagement.com
(mailto:mail@stewardwealthmanagement.com)



Subject *

Message *

SUBMIT

DIFFERENCE
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ABOUT US
Our Name (/our-name)
Our Team (/our-team)

Steward Wealth Management

26 Main Street
Colleyville, TX 76034
817-428-1145
email us (mailto:mail@stewardwealthmanagement.com)

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