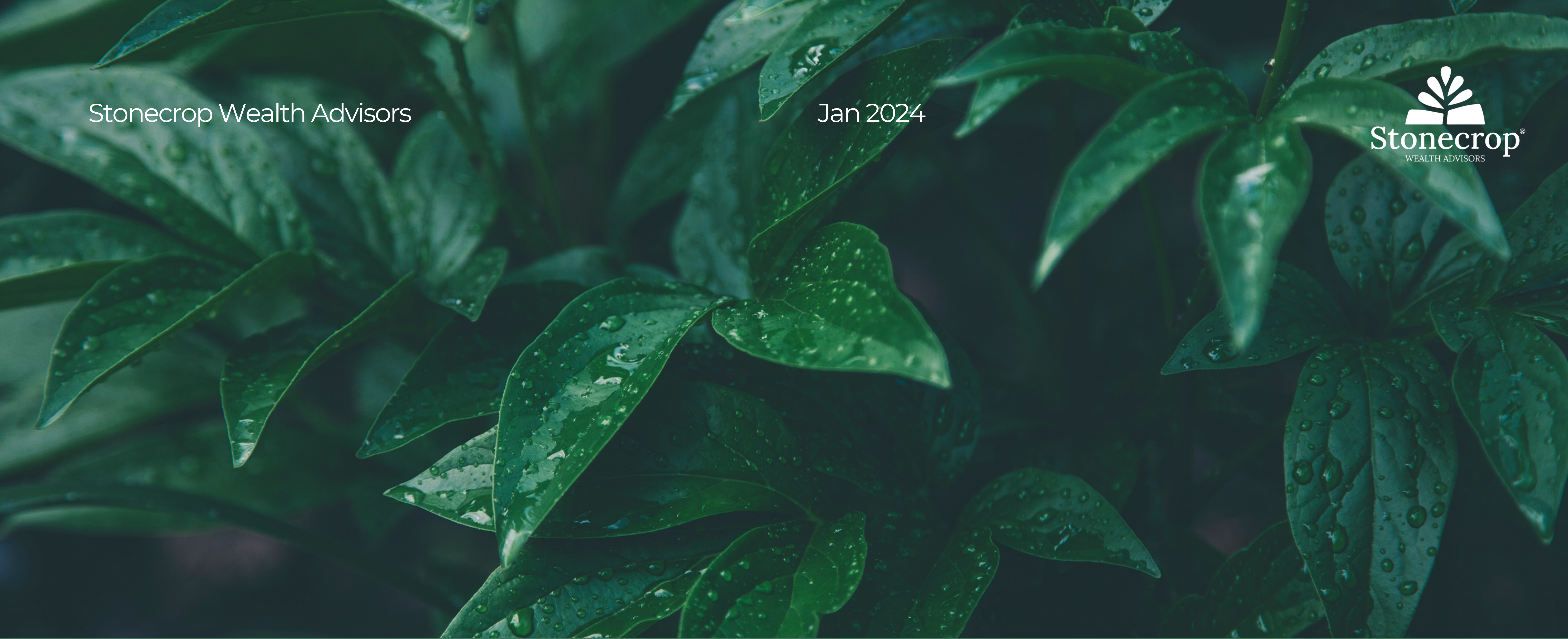
Stonecrop Wealth Advisors

Jan 2024



Media Kit

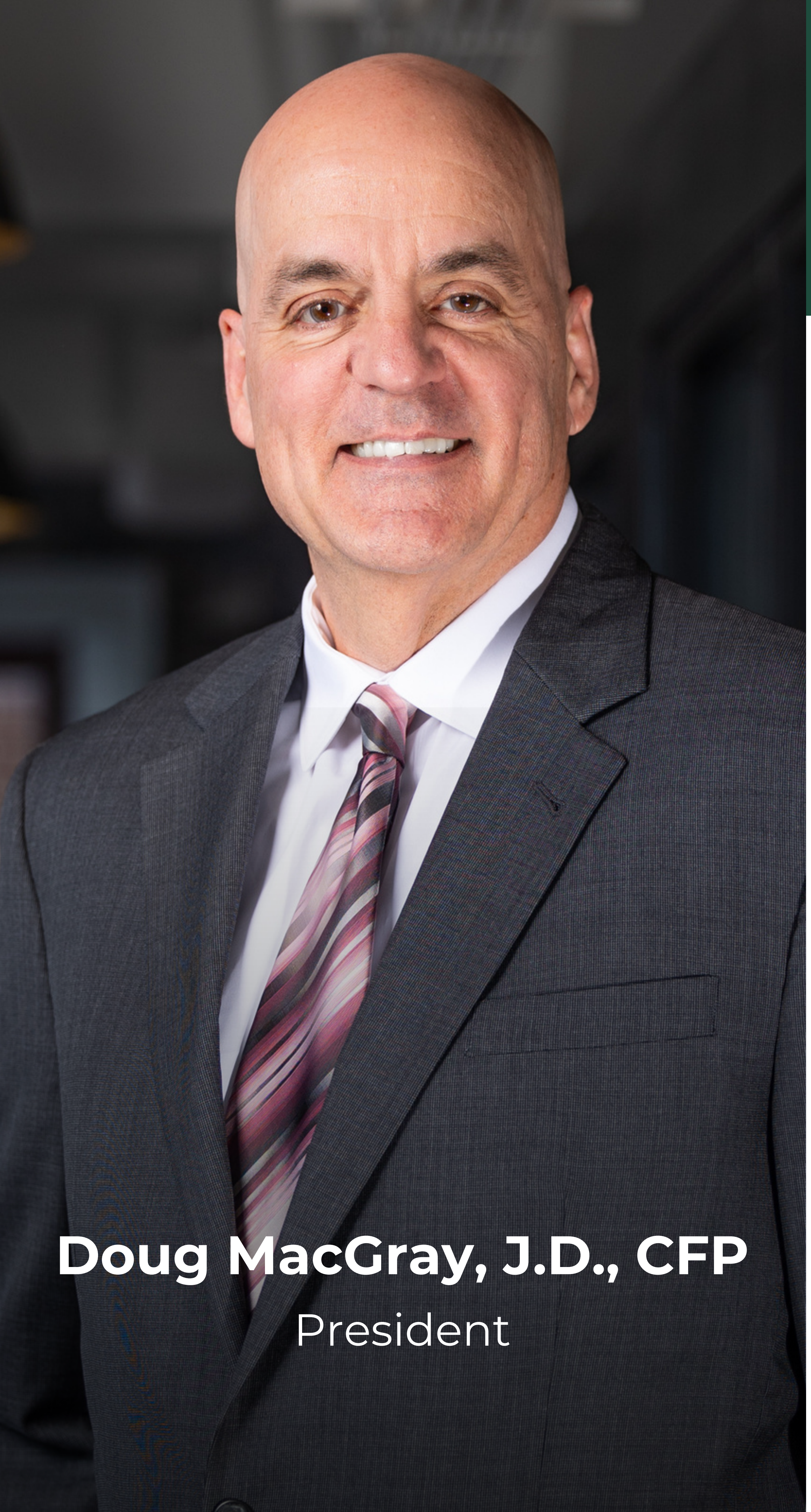
For Podcasts & Webinars in

Faith & finance

FINANCIAL PEACE OF MIND FOR A PURPOSE-CENTERED LIFE.

We are a financial wealth advisory group that works with high net worth individuals, high earners, and institutions.

We work with religious organizations, universities, schools, and non-profit organizations. We also offer faith-based financial planning for those who want to align their finances with their faith.



Doug MacGray, J.D., CFP
President

PURPOSE-DRIVEN TEAM

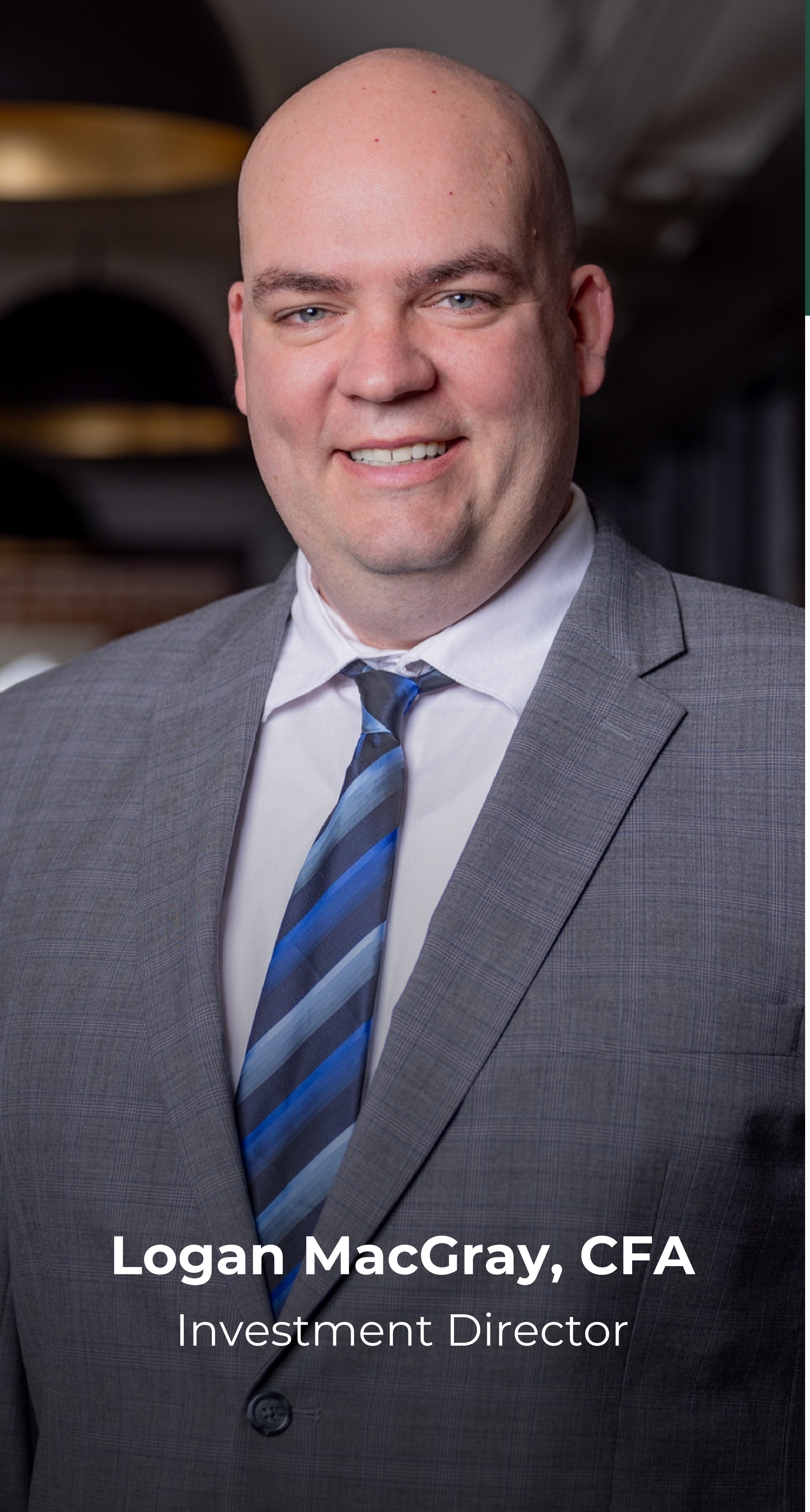
Doug leads the firm, chairs Stonecrop's investment committee, and is the primary advisor for scores of clients. Doug's first taste of financial counseling occurred when practicing law and his primary area of law was estate planning. He often worked side-by-side with clients' financial advisors in creating plans. His wealth management experience now extends over twenty years with deep expertise in portfolio management for endowments, non-profit institutions, and families.

Prior to founding Stonecrop Wealth Advisors, Doug was a founding owner, Senior Vice President, and Chief Institutional Advisor of Compass Ion Advisors where he worked for over thirteen years. He has led his firm's financial planning services and institutional investment services for over ten years. Before working with Compass Ion Advisors, Doug was the founder and branch manager of Andesa Investment Solutions for six years. Doug formed that entity and created the firm's investment platform, compliance program, and investment processes.

INSTITUTIONAL MANAGEMENT
Leads Stonecrop's institutional investment services and financial planning.

FOUNDER / 23 YEARS
Founded Stonecrop in 2000. First introduced to financial counseling when he practiced law centered on estate planning.

FOLLOWER OF CHRIST
Currently serves on the Board of Trustees of Missio Seminary.



PURPOSE-DRIVEN TEAM

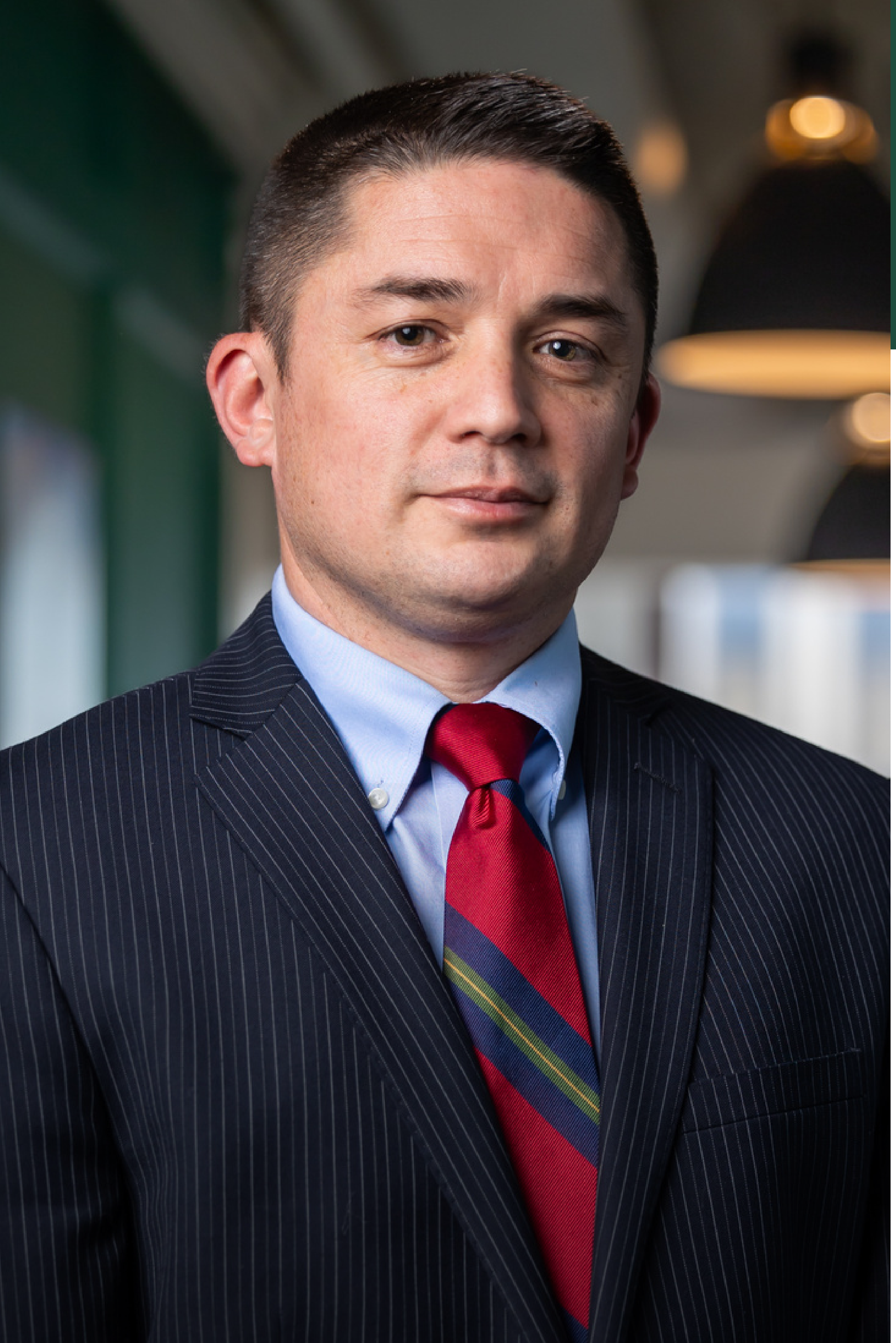
Logan is Investment Director at Stonecrop Wealth Advisors. He has a decade of investment industry experience. He earned the Chartered Financial Analyst Designation (CFA®) in 2021. Prior to joining Stonecrop, Logan led all of the internal administrative and research functions for the investment committee at Compass Ion Advisors. He provided the committee with all of the analytical data and research to assist the investment committee in its decision making.

He was also responsible for reporting to the committee all of the company's performance data as well as performance for funds held by the company's clients. He performed quantitative and qualitative research of fund managers. Additionally, he served over one hundred clients in analyzing and reporting their individual performance, including the performance of virtually all of the company's institutional clients.

DATA DRIVEN
Led all research functions that included analytical data to assist in investment decision making at Compass Ion Advisors.

DECADE OF EXPERIENCE
Earned the Chartered Financial Analyst (CFA®) Designation in 2021.

EXTENSIVE WORKLOAD
Has served over 100 clients in analyzing and reporting their individual performances.



Charles Blachford, M.A.

Institutional Advisory Services Director & Financial Advisor

PURPOSE-DRIVEN TEAM

Charles serves as a Financial Advisor and the Institutional Advisory Services Director at Stonecrop. He is passionate about serving institutions and people through a holistic and personalized approach to financial planning and investment management. Early in his career, Charles realized the need for prudent financial planning when he worked with people battling poverty and homelessness. He saw firsthand how planning, or lack thereof, can be a blessing or a curse to current and future generations. Over the past 20 years, Charles has diligently worked to strengthen the financial health of various nonprofits, educational institutions, and businesses.

Before coming to Stonecrop, he worked as the Executive Vice President of Missio Seminary where he managed the seminary's operations, finances, and endowment and worked closely with the Investing, Finance, and Advancement Committees of the Board. Charles currently serves on the Alumni Council at Messiah University, the Board Development Committee at Pillar Seminary, and as a co-vocational pastor at Bux-Mont Baptist Church in Hatboro, PA. In the past, he has served on the Board of the Court Appointed Special Advocates for Children and as a youth sports coach and referee.

INSTITUTIONAL ADVISOR

Guides institutions and people through financial planning.

PASTOR

Serves as a co-vocational pastor at Bux-Mont Baptist Church.

PEOPLE CENTERED

Member of Alumni Council at Messiah University, Board Development Committee at Pillar Seminary, and youth sports coach and referee.

Dalton Greiner, FPQP

Client Relationship Associate

PURPOSE-DRIVEN TEAM

Dalton Greiner is a Client Relationship Associate at Stonecrop Wealth Advisors where he oversees account administration and assisting with any client or advisor needs. He earned his Financial Paraplanner Certified Professional ™ designation in 2023. He loves to see others find and fulfill their calling in life.

Before joining Stonecrop, Dalton worked in the non-profit sector for over 10 years specializing in creative solutions, communications, project management, leadership, and team building. He began his career at a church where he led their creative arts ministry and then he moved to a non-profit organization where he managed a best-selling author’s podcast and social media channels.

Dalton is a volunteer music team leader at his church where he and his wife are active members.

Dalton has a B.A. in Biblical Studies and Worship Arts from Lancaster Bible College.

RELATIONSHIP BASED

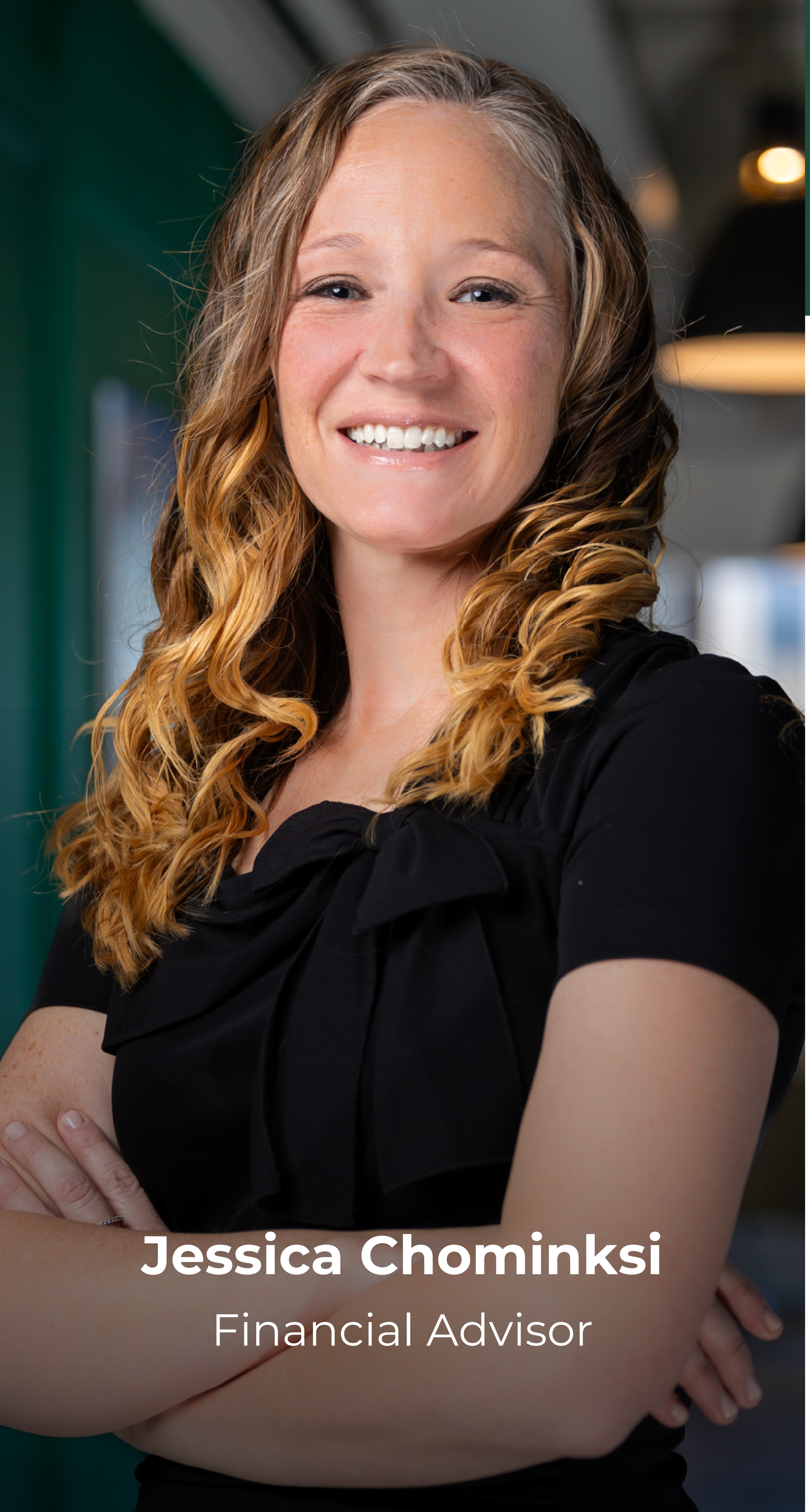
Client Relationship Associate focusing on account administration and assisting clients.

NON-PROFIT BACKGROUND

Specialized in creative solutions, communications, and project management at a non-profit organization for 10 years.

WORSHIP LEADER

Volunteer music team leader at his church where he and his wife are active members.



Jessica Chominksi

Financial Advisor

PURPOSE-DRIVEN TEAM

Jessica Chominski is a Relationship Builder at Stonecrop Wealth Advisors where she enthusiastically seeks opportunities to assist potential and current clients looking to navigate toward their most prosperous future. She has been serving in the United States Army Reserve for nearly 20 years and specializes in assisting other members of the Armed Forces, both currently serving and retired with their unique financial challenges and opportunities.

Before coming to Stonecrop, in addition to military service, Jessica had experience in case management and teaching from both the non-profit and institutional sectors. She earned a Bachelor of Social Work degree from Temple University.
She and her family live in West Chester and are active members of their parish community.

RELATIONSHIP BASED

Focuses on seeking out opportunities to assist potential and current clients.

MILITARY BACKGROUND

Has been serving in the United States Army Reserve for nearly 20 years.

PARISH MEMBER

She is an active member within her parish along with her family.

Case Studies

Real-Life Stories

Some of your listeners may be going through similar life events:

High Net-Worth Individual

Jonathan and Diana were in their 50s when Jonathan first approached us to ask if we could do some financial planning for them. He worked for a large financial institution, and he told me his career was likely winding down in the near future.

When we first began working with Jonathan, we used the phrase, “your money,” and he quickly corrected us. “It’s not my money. It’s God’s money.” He truly believed he and his wife were stewards for God of the wealth they had.

When Jonathan’s company was purchased in a large transaction, Jonathan received a lot of assets all at once, 50% of which he used to create a charitable foundation. We are now managing that foundation’s large portfolio which makes grants each year, and Jonathan and Diana's significant personal wealth. Their goal is to leave a significant amount of wealth to their private foundation at their deaths so that the work they have started can continue.

High Earners, Not Rich Yet

Adam was a fast-rising executive at a U.S. subsidiary of a well-known, foreign, multinational corporation. Adam was from the midwest, and Maya was from Texas. They were living in Texas when they got transferred north near our offices.

We put together a comprehensive financial plan that was somewhat complex because his employer had a confusing array of benefits. As his career progressed, we continued to make recommendations to enhance his ability to become financially independent, be generous, and pay for his sons’ educations.

Institutions

Sarah, a dedicated company executive, found herself plagued by sleepless nights due to financial worries. Seeking solace, she turned to Stonecrop Wealth Advisors for comprehensive financial planning. Our advisors assessed her situation, addressing concerns related to retirement and estate planning. By implementing tailored strategies, Sarah experienced a newfound sense of financial peace of mind. Today, she sleeps soundly, secure in the knowledge that her financial future is expertly managed.

Explore More Case Studies

Not sure if we fit on your podcast?

Here are some topics that may be of interest to your audience

TOPIC

FAITH-BASED

FINANCIAL PLANNING
STEWARDSHIP
CHARITABLE ORG

UNIVERSITIES/SCHOOLS
CHURCHES
NON-PROFIT ORG

RETIREMENT
ASSET PLANNING
WEALTH MANAGEMENT

FINANCIAL PLANNING
STEWARDSHIP
CHARITABLE ORG

TOPIC

INSTITUTIONS

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CHURCHES
NON-PROFIT ORG

TOPIC

INDIVIDUALS & FAMILIES

RETIREMENT
ASSET PLANNING
WEALTH MANAGEMENT

Stonecrop®
WEALTH ADVISORS

We'd Love to Talk

Contact us by phone or email to get started:

info@stonecropadvisors.com

(610)628-0035

Stonecrop®
WEALTH ADVISORS