



WEALTH
INSURANCE
BENEFITS
TAX
CAPITAL
BUSINESS

PERSONAL | BUSINESS | INSTITUTIONAL

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OUR MAIN GOAL

Help your foundation grow its assets under management, ultimately expanding your granting capacity and deepening your impact in the communities you serve.

We accomplish this through a strategic and values-aligned approach:

Mission-Aligned Portfolio Management

- Investment strategies you can confidently present to donors—transparent, values-driven, and performance-conscious.

Technology Integration

- Streamlining operations to lower administrative costs, freeing up more resources for mission, increasing growth capacity, and maximizing impact.

White Glove & Private Label Solutions

- Bespoke services that extend your brand, elevate your donor experience, and maintain relational trust.

Access to Value-Added Services

- From financial planning to Tax to Estate to legacy design—complementary access that enhance your value to donors and families. (Reach out for more)

Together, these capabilities position your foundation as the trusted hub for charitable giving—efficient, principled, and built to last.



ABOUT CASEY

Casey has guided both institutional and individual clients through market cycles with a disciplined, values-driven approach. Most recently, he oversaw \$550 million in assets, delivering bespoke investment strategies tailored to the unique goals of each client. He works hard to understand you and your organizations needs.

Throughout his career, Casey has managed portfolios for a diverse range of clients—including foundations, nonprofits, churches, high-net-worth individuals, and estates—always with an emphasis on stewardship, transparency, and impact.

His strength lies in delivering consistent value. Casey achieves this through a strict vetting process, ensuring alignment with each client's mission and financial objectives.

He has held key roles across analyst, operational, and director-level positions, bringing deep investment expertise and strong partnerships in portfolio management. Casey also brings a track record of institutional insight, having served on boards for churches and nonprofits—giving him firsthand experience navigating the unique challenges mission-driven organizations face. He's a proven leader of cross-functional teams, with a focus on stewardship, alignment, and execution



Casey S. Hayden

Casey Hayden

CEO at Stoneford

Wealth | Investment Advisor at Stoneford Advisors



EXECUTIVE SUMMARY

OVERVIEW



Breakdown of Solution:

- Move accounts to ***Preferred Custodial Relationship***
- Access to ***Orion*** for performance for every client included, other technology as requested
- ***Stoneford*** can handle all trades through a dedicated trading phone line and email
- ***Stoneford*** will handle all account paperwork
- ***Stoneford*** will coach your team and handle the transition to new custodian



CORE PORTFOLIOS

CURRENT CASH FLOW

Custom fixed income portfolio to reliably cover 10 years of grant commitments. This approach reduces reliance on market volatility, ensuring long-term stability and mission continuity.

CASH

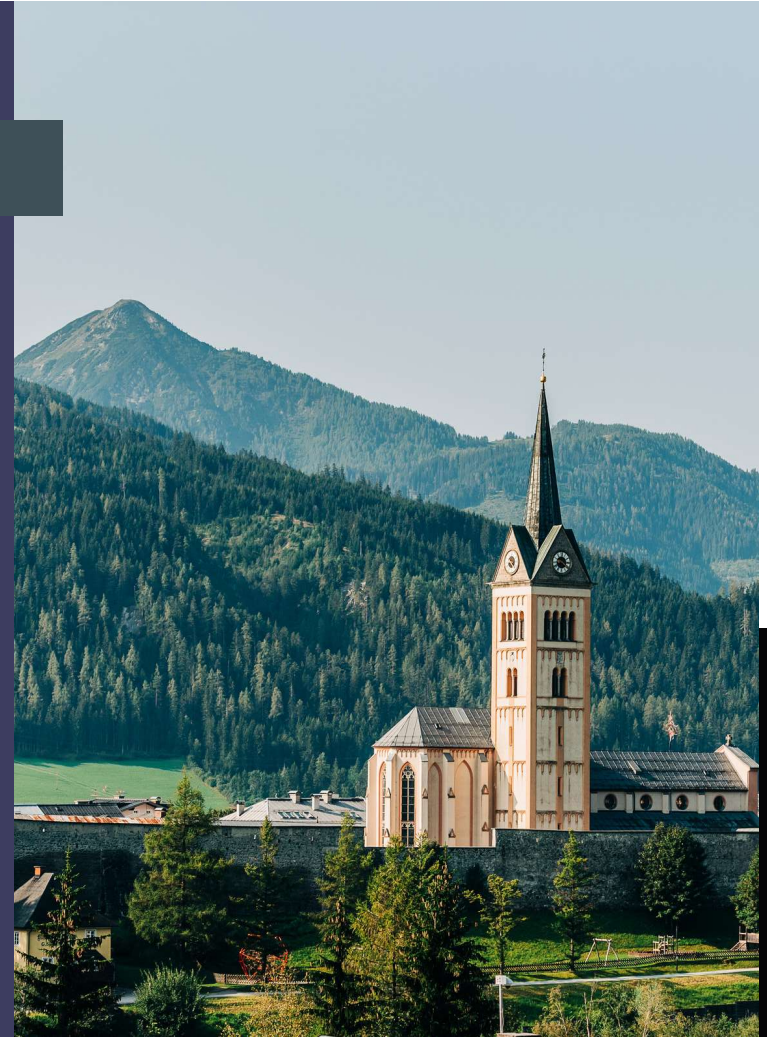
Cash management ensures that idle funds are strategically allocated to preserve capital, maintain liquidity, and earn a competitive return. This disciplined approach supports the foundation's mission by maximizing resources available for grants and operations.

FUTURE CASH FLOW

Aims to generate long-term growth that outpaces inflation and replenishes capital over time. We manage core portfolios with a disciplined, contrarian approach, this strategy supports future grantmaking.

GROWTH

We are uniquely designed to ensure your portfolio has access to assets that fit comfortably inside the investment policy. This bucket helps you strategically align your dollars to your values.





SOLUTIONS AND MANAGERS

Asset Management

- Cash: **Stoneford Advisors**
- Current Cash Flow Portfolio: **Powers Asset Management**
- Future Cash Flow Portfolio: **Peavine Capital**
- Growth: **Stoneford Advisors**

Outsourced Chief Investment Officer & Trading

- Economic and Investment Counsel: **Various**
- Coordination and Servicing: **Stoneford Advisors**
- Trading: **Stoneford Advisors**
- Account & Technology Support: **Stoneford Advisors**



PORTFOLIO MANAGERS



Mike Powers
CIO at Powers Asset
Management

Mike has over 20 years of experience as both a portfolio manager and analyst as well as a prior tenure on the Fixed Income trading desk. He holds undergraduate and graduate degrees (MBA) from Boston College where he was the starting quarterback on the football team in the late 80's. Mike, as the firm's CIO, is responsible for all portfolio structuring and continued monitoring. Prior to founding Power Asset Management in 2003, he was the Director of Fixed Income for Howard Capital Management and Fixed Income portfolio manager for RNC Genter in Los Angeles. The earlier part of his Fixed Income career was at Paine Webber in Los Angeles on the Fixed Income trading desk and Merrill Lynch in Boston as a financial consultant concentrating on Fixed Income investing.

Ken Lambert founded Peavine Capital in 2012 after serving as Chief Investment Officer of Nevada's \$35 billion public pension plan. He has 31 years of investment management experience, leading investors through some of the most volatile markets in history. At Peavine Capital, Ken provides high net worth investors the same unique, common sense investment strategy he implemented for Nevada PERS'. Peavine oversees more than \$1 billion in assets. Ken is a Chartered Financial Analyst (CFA) and Chartered Alternative Investment Analyst (CAIA). His strength lies in disciplined portfolio management, calm leadership and clear communication—qualities that help investors stay confident in uncertain markets.



Ken Lambert
CEO at Peavine
Capital



HOW STONEFORD HELPS ENTITIES PLAN

PURPOSEFUL INTEREST

Invested \$225,000 for one organization, using the interest income to match retirement contributions, cover expenses, and support growth.

ACCEPT NON-CASH DONATIONS

Helped a fiscal sponsor enhance their cash management solutions, boost growth and liquidity, and increased income by accepting non-cash donations.

FUND GROWTH

Invested a \$1.5 million gift in fixed income and equities, with interest covering a full-time salary during cash flow gaps in gifting, all while protecting the principal.

ESTABLISH PERPETUAL GRANTS

Assisted an organization in securing a \$1 million donation and used it to establish a sustainable \$50,000 annual grant in perpetuity.



FEES



	NATIONAL Average Range	Stoneford Advisors
OCIO and Portfolio Manager Management	.25%-.65%	.15%
Client Servicing, Trading, and Technology	.05-.15%	.10%
External Portfolio Manager	.20-.30%	.14-30%
Fund Fees	.20-.75%	0-.10%





OTHER MANAGERS

- 1) Over Diversify
- 2) Hold too much cash
- 3) Don't actively manage cash
- 4) Overemphasize liquidity
- 5) Overemphasize income-producing investments
- 6) Generic risk profiles
- 7) Claim it is too expensive to customize

STONEFORD:

- 1) Tailored Diversification
- 2) Allocate and Invest with intentionality
- 3) Actively manage cash positions
- 4) Customize liquidity
- 5) Tailor investments strategy to meet outcomes
- 6) Base risk profiles around time horizons
- 7) Value proposition comes through tailored strategy
- 8) Aim to help you sleep better



ALL SOLUTIONS

Organization:

- Health Insurance
- Investment Management
- Retirement Plan
- Ancillary Insurance
- Tax Preparation
- Commercial Insurance
- Technology
- Payroll, Bookkeeping, and more, offered through Auxilio Essentials

Personal:

- Personal Wealth Planning
- Personal Tax Preparation
- Full Estate Planning
- Life, Disability, LTC Insurance
- Home, Auto, and Specialty Insurance
- Investment Management
- Health Insurance & Medicare
- Personal Business Insurance

Coming 2025:

- Digital Quoting, Binding, Enrollment marketplace for health, organization, and personal lines
- Digital retirement, investment, and tax preparation marketplace

