
STONEFORD
WEALTH
INVESTMENTS
BENEFITS
INSURANCE
PERSONAL | BUSINESS | INSTITUTIONAL

INVESTMENT, WEALTH, AND RETIREMENT ADVISORY SERVICES OFFERED THROUGH MUTUAL ADVISORS, LLC DBA STONEFORD ADVISORS, AN SEC REGISTERED INVESTMENT ADVISER. STONEFORD ADVISORS, NOR ANY OF ITS MEMBERS, ARE TAX ACCOUNTANTS OR LEGAL ATTORNEYS, AND DO NOT PROVIDE TAX OR LEGAL ADVICE. FOR TAX OR LEGAL ADVICE, YOU SHOULD CONSULT YOUR TAX OR LEGAL PROFESSIONAL.

INSURANCE, TAX, ESTATE, BUSINESS SERVICES OFFERED THROUGH STONEFORD CREATIVE, LLC DBA STONEFORD,PEAVINE CAPITAL, LLC, AND POWERS ASSET MANAGEMENT. NO CLIENT OF STONEFORD ADVISORS IS REQUIRED TO USE STONEFORD CREATIVE, LLC, PEAVINE CAPITAL, LLC, AND POWERS ASSET MANAGEMENT. STONEFORD CREATIVE, LLC IS NOT AFFILIATED WITH MUTUAL ADVISORS, LLC.

POWER ASSET MANAGEMENT IS A REGISTERED INVESTMENT ADVISER. ADVISORY SERVICES ARE ONLY OFFERED TO CLIENTS OR PROSPECTIVE CLIENTS WHERE POWER ASSET MANAGEMENT AND ITS REPRESENTATIVES ARE PROPERLY LICENSED OR EXEMPT FROM LICENSURE. THIS WEBSITE IS SOLELY FOR INFORMATIONAL PURPOSES. PAST PERFORMANCE IS NO GUARANTEE OF FUTURE RETURNS. INVESTING INVOLVES RISK AND POSSIBLE LOSS OF PRINCIPAL CAPITAL. NO ADVICE MAY BE RENDERED BY POWER ASSET MANAGEMENT UNLESS A CLIENT SERVICE AGREEMENT IS IN PLACE. POWER ASSET MANAGEMENT IS IN COMPLIANCE WITH THE GLOBAL INVESTMENT PERFORMANCE STANDARDS (GIPS) AND COMPLIANT PRESENTATIONS AND COMPOSITE DESCRIPTIONS CAN BE PROVIDED UPON REQUEST BY EMAILING

PEAVINE CAPITAL, LLC IS A REGISTERED INVESTMENT ADVISER. THIS WEBSITE IS SOLELY FOR INFORMATIONAL PURPOSES AND IS NOT A SOLICITATION TO BUY NOR OFFER TO SELL SECURITIES. INVESTING INVOLVES RISK AND POSSIBLE LOSS OF PRINCIPAL. PAST PERFORMANCE IS NO GUARANTEE OF FUTURE RETURNS. INVESTMENT ADVISORY SERVICES OFFERED THROUGH PEAVINE CAPITAL, LLC. ADVISORY SERVICES ARE ONLY OFFERED TO CLIENTS OR PROSPECTIVE CLIENTS WHERE PEAVINE CAPITAL, LLC AND ITS REPRESENTATIVES ARE PROPERLY LICENSED OR EXEMPT FROM LICENSURE. ASSETS INCLUDE DISCRETIONARY ASSETS UNDER MANAGEMENT AND ASSETS UNDER ADVISEMENT.

OUR MAIN GOAL

Help you or your organization grow its assets under management, ultimately expanding your 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 Hayden
CEO at Stoneford
Wealth | Investment Advisor at Stoneford Advisors

EXECUTIVE
SUMMARY

OVERVIEW

Breakdown of Solution:

- Move accounts to ***Preferred Custodial Relationship*** and create banking connections
- 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

Our aim- simplicity through focus.

CORE PORTFOLIOS

CURRENT CASH FLOW

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

FUTURE CASH FLOW

EQUITIES: 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 cash needs.

CASH

Cash management ensures that idle funds are allocated to preserve capital, maintain liquidity, and earn a competitive return. This disciplined approach aimed supports short term needs.

GROWTH

EQUITIES and ALTS: 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.

SPECIALTY PORTFOLIOS - SIMILAR STRATEGIES

My leveraging our same models and metrics, we are able to build portfolios tailored to your values. We still focus on simplicity and cash flow, but align your values with your security selection. With specialty portfolios, it is key to understand there are risks, present a potential for performance differentials, and may not perfectly align with all beliefs.

ESG VALUES BASED

Environment, Social Justice, and Corporate Governance. These portfolios leverage the same principled cash flow strategy, but selects assets that align with your values and portfolio desires.

BIBILICALLY RESPONSIBLE

This portfolio uses the same key markets and allocations as our core portfolios, but screens securities or selects funds that screen securities based on widely accepted biblical principles.

DIRECT INVESTMENT CONSULTING

Direct Investments are alternative investments. While we do not manage these assets, nor custody them, we can support your efforts to align your investments with your values. For many this looks like private credit, private equity, real estate, or more. Consulting on these assets helps keep your entire portfolio aligned with your needs.

SOLUTIONS AND MANAGERS

Asset Management

-Cash: **Stoneford Advisors**

-Current Cash Flow Portfolio: **Powers Asset Management**

-Future Cash Flow Portfolio: **Peavine Capital**

-Growth: **Stoneford Advisors**

-Values Based Investing: **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 INDIVIDUALS & ENTITIES PLAN

PURPOSEFUL RETIREMENT

Invested $225,000 for one individual, using the interest income to match retirement distributions, cover specific expenses, and support growth.

INVESTING INHERITANCE

Invested an inheritance of $1.5 million, providing annual income, liquidity, and covering expenses allowing a family to leverage throughout life.

FUND ORGANIZATIONAL NEEDS

Invested a $7.5 million gift in fixed income and equities, with interest covering two full-time salaries and daily expenses, 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 to support their community.

FEES

Individuals, Family, Personal, Organizational

	Stoneford Advisors Annual Fee
Below $5,000,000	**.95%**
Above $5,000,000	**.55%**
Custom Fixed Income	**.20%**
Fund Fees	**0-.10% Core .20-.67% Values**
Foundation, Endowment, or other Institution	**See next page**

FEES- OUTSOURCED CHIEF INVESTMENT OFFICER

Foundations, Endowment, Pension & More

	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% Core .20-.67% Values**

OTHER MANAGERS:

1) Over Diversify
2) Don't monitor cash flow needs
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:

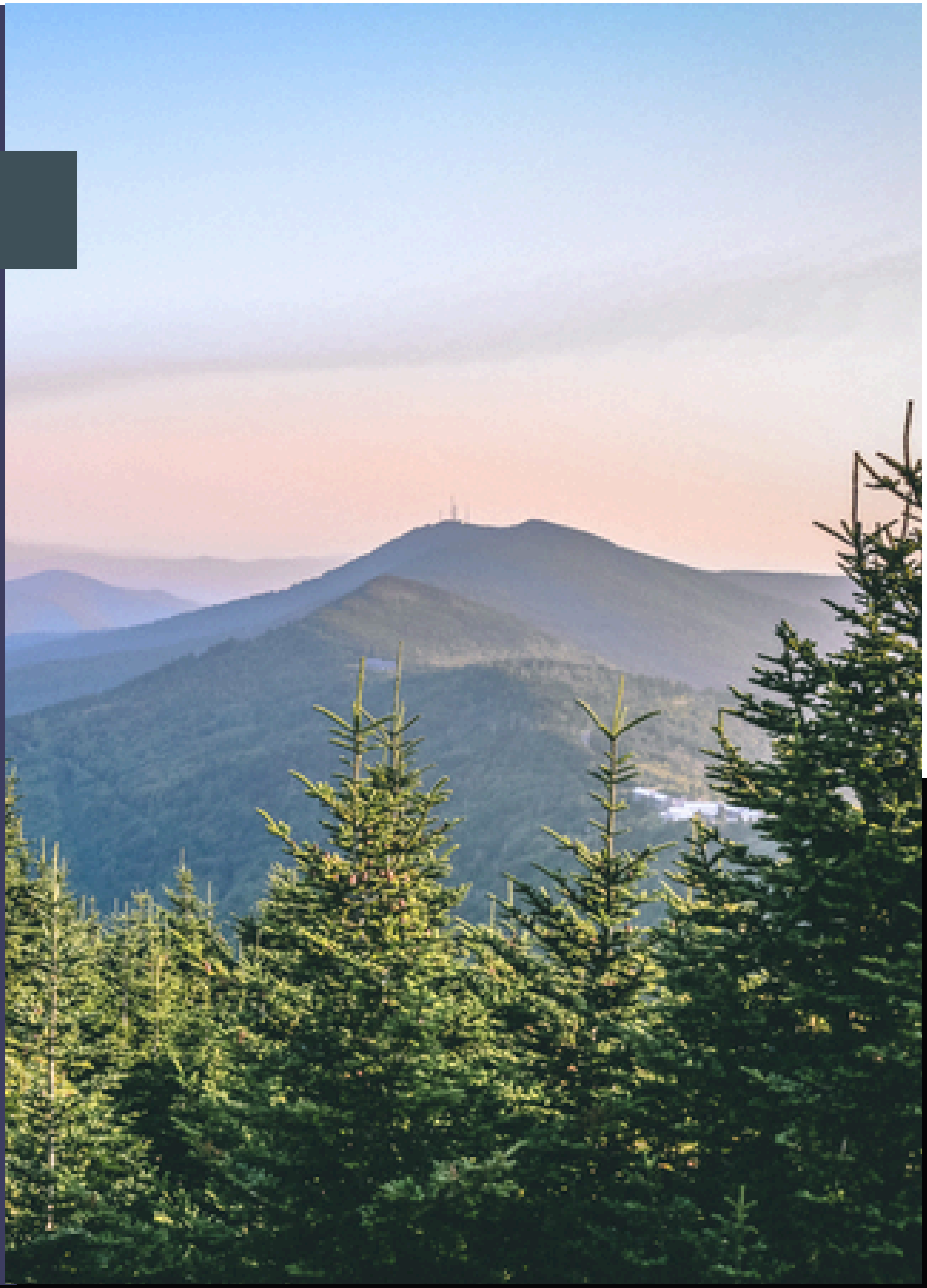
- Health Insurance
- Investment Management
- Retirement Plan
- Ancillary Insurance
- Tax Preparation
- Commercial Insurance
- Technology
- Payroll, Bookkeeping, and more

Personal:

- Personal Wealth Planning
- Personal Tax Preparation
- Full Esate 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



THE STONEFORD TEAM

+
Casey Hayden

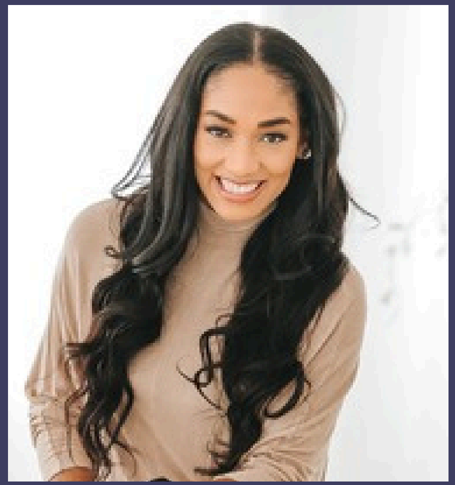
Sr. Investment Manager
OCIO

+
James Johnston

Relationship Director
Associate Advisor

+
Chauncey Malone

Business, Estate,
and Legal Advisor



+
Niché Caldwell

VP of Operations
Associate Advisor