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For more information, contact:
Audrey Froehlich, WalshCOMM
602-957-9779
afroehlich@walshcomm.com

# Stoker Ostler Wealth Advisors' Founding Partner Honored by *Worth* Magazine

*Phil Stoker Ranks Among Top 250 Wealth Advisors in the Country*

**Scottsdale, Ariz. (October 22, 2008)…**Stoker Ostler Wealth Advisors is pleased to announce that founding partner, Phil Stoker, has been ranked among the Top 250 Wealth Advisors by *Worth* Magazine.

Every year, *Worth* Magazine recognizes an elite group of professionals in the field of wealth management. The annual rankings, which will be published in *Worth's* October issue, are based on expertise, insight, trustworthiness and commitment to clients' needs. The Top 250 list represents months of extensive research and rigorous analysis of the country's most dedicated advising individuals and lists only the top players.

"It is quite an honor to be recognized among some of the country's top advisors," said Stoker. "I really credit my colleagues and my clients for my career success and truly enjoy providing top quality service. My work is about helping people reach their dreams and it is very rewarding."

Stoker is a Managing Partner at Stoker Ostler Wealth Advisors with direct responsibility for the firm's financial planning and new business development. He consults with clients nationwide, specializing in retirement planning, investment analysis, charitable giving and cash flow planning. He is a member of the firm's investment committee which is responsible for setting investment policies and portfolio strategies.

Prior to founding the firm in 1997 with Creg Ostler, Stoker spent two decades in senior positions with a private foundation and large, national financial institutions in San Francisco, Seattle, Chicago and Scottsdale. He has extensive experience in analyzing financial models, reviewing scenarios and recommending solutions to individuals and families to help them achieve life financial goals. Stoker has developed a comprehensive seven-step process that is the foundation of the firm's financial planning.

In addition, he is a CERTIFIED FINANCIAL PLANNER™ as well as a current member of the National Association of Personal Financial Advisors (NAPFA), the President's Leadership Council for Brigham Young University-Hawaii and the national Schwab Institutional Advisory Board. He is a past adjunct faculty member for the College for Financial Planning. Stoker received his bachelor's degree in finance and MBA from Brigham Young University's Marriott School of Management.

Stoker volunteers with Families Helping Families, a home building program for homeless families in Mexico, with the Boy Scouts of America and is very active in his church. He has previously been involved with the Inner-City Youth Foundation in Chicago and other charitable organizations.

In 2007, *Wealth Manager* Magazine ranked Stoker Ostler among the top 200 wealth management firms in the country, with average assets under management of just over $1.67M per client. The firm is also listed in *The Business Journal Book of Lists* as the fourth largest investment advisory firm in Arizona. Earlier this year, Stoker Ostler was named as one of the nation's 5000 fastest growing companies by *Inc. 5000 Magazine* for the second year in a row.

For more information, visit www.StokerOstler.com.

**About Stoker Ostler Wealth Advisors**
Founded in 1997, Stoker Ostler Wealth Advisors, formerly Private Wealth Management, is a fee-only wealth management firm that specializes in managing investments and providing financial planning for private individuals and families, small-to-medium-sized institutions and nonprofit organizations with investment assets greater than $500,000. In addition, the firm provides reporting, periodic rebalancing and active tax management services for its clients.

Stoker Ostler manages over $700,000,000 in total assets. Additional areas of expertise include: retirement planning, 401(k)/IRA distribution and issues related to the death of a spouse, divorce, inheritance and stock options.

The firm's founders, Philip Stoker and Creg Ostler, have more than 50 years of combined experience in wealth management. Stoker Ostler is employee-owned, allowing the company to steer clear of conflicts of interest that can arise when wealth managers are aligned with a product-based financial service company. Stoker Ostler's independence, combined with the long-standing relationships cultivated with other financial professionals, allows the firm to provide successful, unbiased financial guidance, based solely on the needs and expectations of each client.

Stoker Ostler is headquartered in Scottsdale, Ariz. with an additional office in Utah. For more information, call (480) 890-8088 or visit www.StokerOstler.com.

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