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## Financial firm builds executive team amid move, name change

The Business Journal of Phoenix - May 2, 2007 by [Chris Casacchia](#) The Business Journal

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**Stoker Ostler Wealth Advisors** has named three new managing partners, the company announced Wednesday.

April Ward, senior financial adviser, Michael Bolar, senior portfolio manager, and Michael Halls, principal of the firm's Salt Lake City office, have been added to the Mesa company's executive team.

"Each of these individuals has enhanced our firm greatly over the last few years, and each has received outstanding reviews from clients and the financial community," said Managing Partner Creg Ostler.

Ward, a Phoenix resident, joined Stoker Ostler in 2004. As senior financial adviser, she works with high net-worth individuals to reach client's financial goals. Ward began her career in the financial sector in 1988 and has worked for several large, national financial institutions.

Bolar assists clients in identifying financial goals and establishing investment strategies. The Scottsdale

resident is a member of the firm's investment committee, which sets investment policies and portfolio strategies for the firm.

Bolar joined Stoker Ostler in 2003 with nearly two decades of experience, including as a team member responsible for the management of an equity mutual fund with more than \$1 billion in assets.

Halls runs Stoker Ostler's Salt Lake City office and joined the firm in 2000 after spending several years as an analyst and manager in the financial services industry.

In addition to the election of three new partners, Stoker Ostler Wealth recently changed its name from Private Wealth Management.

"When we started the firm, we had purposely chosen a name that said what we did, rather than focusing on us," said Managing Partner Phil Stoker. "After much deliberation and research, we have decided to follow the longstanding tradition among personal service firms, such as law firms, accounting firms and investment firms, of using our names as the founders."

Stoker Ostler also revamped its logo and marketing materials, is in the process of launching a new Web site and plans to move its headquarters from Mesa to Scottsdale this summer.

As of May 2007, Stoker Ostler managed more than \$710 million in assets.

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