Eileen T. Stoner, CRPC®, CDFA®

Senior Vice President–Wealth Management

Skills and abilities

My goal is to help clients achieve their financial goals and aspirations. With 20 years of industry experience, I enjoy serving clients who find value in partnering with a full-service investment professional. I aim to understand my clients and their experiences, hopes and dreams—as well as the challenges they deal with—and in doing so, recommend and implement solutions that help lead them to success. As a portfolio manager, I help develop investment strategies with income solutions in mind. As a Chartered Retirement Planning Counselor℠, I help assist clients with a diverse mix of retirement preparedness education sessions and ongoing investment management for the next chapter of their lives. My experience and knowledge enable me to offer customized wealth management advice and solutions for personalized retirement income strategies. While retirement preparation and transitioning is oftentimes an exciting season of life, other transitions can be difficult. As a Certified Divorce Financial Analyst®, I help counsel individuals who seek financial education and coaching so that they can make well informed decisions as they navigate the challenges of separation, divorce or the death of a spouse.

Experience

UBS Financial Services Inc. July 2011 – current
Senior Vice President–Wealth Management
Portfolio Manager
Chartered Retirement Planning Counselor℠ (CRPC®)
Certified Divorce Financial Analyst®

Morgan Stanley August 1997 – June 2011
Senior Vice President
Named to Chairman's Club. One of an elite group of women advisors to achieve this status.

Education

Rider University, Lawrenceville, New Jersey
Bachelor of Business Administration in management and organizational behavior

Awards and Recognition

Eileen Stoner was recognized by *Forbes*/Shook as one of the Top Women Wealth Advisors in 2020

In the news

Eileen Stoner makes "*Forbes* list of Top Women Advisors." Huntersville Harold Citizen, May 2020.
"Faith, Family and Friends." *Lake Norman Woman* magazine, February 2017.
"Faith, Family and Giving Back." *Lake Norman Currents,* September 2016.
"Making a Difference." *Talking Points* magazine, July 2013.
"The Power of Giving." *Lake Norman* magazine, March 2013.
"Building a Better World." *Talking Points* magazine, November 2012.
"Business Beat: The Stoner Group." *Talking Points* magazine, September 2011.
"Matrimony at the Office." *Lake Norman Currents,* February 2015.
"Best Advisor Teams." *Research* magazine, 2008.

Publications

Stoner, Eileen. "CDFA Professional and Counselor; A Match Made in Heaven." DFA Journal April – June 2020
Stoner, Eileen. "Easy Wins: Quick Ways to Help a Client Who Is Outside the Financial Loop." *Family Lawyer* magazine, June 2018.
Stoner, Eileen. "Salvaging a Retirement Strategy Post Divorce." divorcesource.com, June 2018.

Leadership

Lake Norman YMCA Advisory Board of Directors
Walk Thru Bethlehem Advisory Board
Bonfire Ministries Board of Directors (past)

Community

Eileen leads the monthly Second Saturday Lake Norman workshop for women. The Second Saturday workshop provides education and informational resources to women who are navigating the steps of separation and divorce. Second Saturday workshops have been established coast-to-coast over the last three decades by the non-profit *WIFE.org.*

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