STONE BARN TIMES

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Covenant
Wealth Strategies, LLC

Ward Recognized by *Forbes* as a Best-In-State Wealth Advisor for Third Year in a Row

Forbes has recently recognized G. Ward Keever IV, CLU, ChFC, RHU, AEP, CFS, AIF, CKA®, President and CEO of Covenant Wealth Strategies as a **2023 Best-In-State Wealth Advisor**. This is Ward's third consecutive year being recognized by Forbes.

According to *Forbes*, the annual ranking spotlights the nation's top-performing advisors, evaluated based on criteria* that includes industry experience, client retention, nominations and assets under management.

"On behalf of LPL, I couldn't be more honored to congratulate Ward for this distinguished industry recognition from *Forbes*," said Julian Lopez, LPL Executive Vice President, Independent Advisor Services. "With more than thirty years in the financial service industry, Ward has become a leader in providing a high-quality experience for clients. Ward continues to be laser-focused on adding value and making a meaningful impact in the lives of their clients."

"I would like to acknowledge our entire Team at Covenant Wealth Strategies as such awards are only given to an individual. However, we all know it would not be possible without the team effort. We are humbled and honored to be recognized by *Forbes*. We are thankful for the opportunity and would like to express our sincere appreciation to our clients who make such recognition possible. We are blessed to be able to do meaningful work, for people we care about, with people we care about," expressed Ward.

> *"We are humbled and honored to be recognized by Forbes. We are thankful for the opportunity and would like to express our sincere appreciation to our clients who make such recognition possible. We are blessed to be able to do meaningful work, for people we care about, with people we care about."*

LPL Financial, Forbes and Covenant Wealth Strategies are all separate entities.

**The Forbes Best-In-State Wealth Advisor ranking, developed by SHOOK Research, is based on in-person and telephone due diligence meetings and a ranking algorithm that includes: client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK Research receives a fee in exchange for rankings.*

Ward Added to the LPL Ambassador Council

LPL Financial has recently named G. Ward Keever, IV, CLU, ChFC, RHU, AEP, CFS, AIF, CKA®, President and CEO of Covenant Wealth Strategies as a new member of the **LPL Ambassador Council**. Ward is one of 60 members selected from among more than 21,000 LPL advisors and institution leaders nationwide into one of three councils determined by the members' affiliation with LPL.

The LPL Ambassador Council's vision is to deepen relationships with a diverse cross-section of highly dedicated financial professionals. In bringing together these earnest and respected individuals, LPL creates a well-informed and extended advocate community.

The Ambassador Council program provides a formal opportunity for advisors and institution leaders to stay closely connected to LPL's strategic roadmap and key executives, while sharing their experience, feedback and support with peers by affiliation type. By serving in this capacity, Ward and the Team at Covenant Wealth Strategies are able to provide feedback on opportunities for LPL to better enable us as advisors to serve our clients.

Council members serve a multi-year term and attend a series of in-person meetings during their tenure. They also contribute throughout the year by supporting LPL communications, events, initiatives, and by connecting with their LPL colleagues on an ongoing basis to ensure their perspectives are brought forward.

Ward is one of 60 members selected from among more than 21,000 LPL advisors and institution leaders nationwide into one of three councils designated by the members' affiliation with LPL.

Dan Crisona Joins Our Advisor Team!

Professional Designations & Licenses:

- Accredited Investment Fiduciary (AIF®)
- Series 7, 65, and 63 securities registrations with LPL Financial

Interests Include:

In his free time Dan loves cooking, golfing, reading, traveling, playing tennis, and spending time with his wife Amy, friends, and family. He is also an avid Blue Hens football fan.

Wealth Advisor

Dan Crisona, AIF®

Dan Crisona is an Accredited Investment Fiduciary (AIF®). Dan's experience in the financial services industry makes him a great addition to the team at Covenant Wealth Strategies. Dan is passionate about understanding our clients' personal, professional, and financial goals. He strives to be one of our client's first five phone calls in times of transition.

Dan is a graduate from Salesianum High School and the University of Delaware with a degree in Hospitality Business Management. Dan joined Covenant Wealth Strategies in 2021 as a Client Concierge before becoming a Wealth Advisor. He was primarily responsible for supporting Client Strategy Sessions. Prior to joining Covenant, Dan gained valuable experience servicing ultra-high net worth clients for J.P. Morgan.

Among many talents, Dan is skilled in financial planning, retirement planning, charitable giving, investments, and relationship management. Dan is excited to foster relationships with our clients at Covenant Wealth Strategies and is committed to helping our clients pursue their unique goals and objectives.

Dan is also part of the Covenant Wealth Strategies Investment Team that delivers investment solutions for our clients.

Covenant Celebrates New Team Member: Jen Ellison

Covenant Wealth Strategies is very excited to announce our newest team member! Please welcome Jennifer (Jen) Ellison who joins us as a Client Concierge!

Jen's professional experience in financial services, combined with her enthusiastic attitude makes her a valuable addition to our Covenant Wealth Strategies' team.

Jen previously supported research analytics and client services at Covenant Wealth Strategies from 2003 - 2011. She went on to gain additional experience with J.P. Morgan where she was responsible for confirming trade settlements across North and South American markets as well as working on the derivative and collateral management team. Most recently, Jen worked at BlackRock where she supervised teams within the securities lending and cash operations functions with a focus on managing prime broker and custodian relationships.

In her new role, Jen will be responsible for supporting many of our operational functions while providing proactive concierge service to clients of Covenant Wealth Strategies.

Jen is a Delaware native who was born and raised in Newark, Delaware. She graduated from Christiana High School and earned her Bachelors of Science degree in Elementary Education from Elizabethtown College where she graduated with honors.

Jen currently lives in New Castle, Delaware with her husband, Jason and their three rescue dogs Norman, Charlie, and Georgia as well as their rescue cat Oscar. In her free time, Jen enjoys camping, hiking, making jewelry and photography.

Please join us in welcoming Jen to the Covenant team!

Fun Fact

Jen made the Delaware all-state-band each year that she tried out for flute in high school. She learned to play the baritone for marching band, as well as the French horn. Jen also has her motorcycle endorsement certification!

Why Jen Joined Covenant

"Having had the opportunity to work at large investment and financial firms, I found that I really missed the personal client interactions. Joining Covenant allows me to see and celebrate the positive impact and outcomes that we accomplish together for our clients as a team."

Jen and her husband Jason enjoy going on adventures together - both on foot and on motorcycle!

Jen has a passion for exploring and photography

Past Events & Long-Term Care Resources

Whether it is planning for your own needs or the needs an aging parent or loved one, it can often be a sensitive and delicate task to undertake. Unfortunately, many families are not prepared or informed of their options. We welcome you to scan the QR code to the right to view the slides from our recent presentation. We hope this information provides you with peace of mind and equips you with resources as you think about your future needs.

SCAN ME

Creating a care plan can help you and your family face the future with confidence. We welcome you to scan the QR code to the right to thoughtfully review and answer the questions. Our Long-Term Care Plan Worksheet can also be found on our website (**www.covenantwealthstrategies.com**), under the Resources Tab/Long-Term Care.

SCAN ME

Care Patrol, Scott Dow, Theresa Dow, Securian, Covenant Wealth Strategies and LPL Financial are separate entities and do not make representation to each other.

Join Us at this Upcoming Event!

Covenant
Wealth Strategies, LLC

SUMMER
ICE CREAM SOCIAL!

BRING YOUR FAMILY & FRIENDS AND JOIN US!

Tuesday, July 11th	**Our Office** **15 Middleton Dr.** **Wilmington, DE 19808**	**6 - 8 pm**

Rain date: 7/12/23

People & Places

Team Dinner at Deerfield

Our team at Covenant Wealth Strategies had a wonderful gathering earlier this year at Deerfield Country Club. We used the opportunity to reflect on and celebrate the successes of the past year. We are so thankful that we get to do meaningful work with people we care about, for people we care about!

Summit Conference

LPL Financial recently hosted their Top Advisors in Barcelona, Spain for their Summit Conference. Representing the pinnacle of success, this exclusive event convenes a prestigious community of leaders to network, share learnings and discuss solutions for our industry's most pressing challenges.

Sightseeing in the Montserrat mountains! Ward and Debbie also visited Montserrat Monastery, which was originally built back in 1024!

Ward and Debbie in front of the Codorníu winery in Barcelona, Spain during the LPL Summit conference.

Kingdom Advisors Conference

The Kingdom Advisors Conference is a premiere gathering of financial services professionals, which equips financials advisors to serve their values-based client.

Ward with Kingdom Advisors Director, Randy Glass, LPL CEO, Dan Arnold and LPL Relationship Manager, Scottie Harris at the annual Kingdom Advisors conference in Orlando, FL.

The Covenant Wealth Portal & Vault Checklist

The Covenant Wealth Portal, offered exclusively to clients of Covenant Wealth Strategies (CWS), is an easy to use, web-based platform that provides a single access viewpoint into your overall financial picture. In this issue of the Stone Barn Times, we are highlighting the Vault within The Covenant Wealth Portal, which provides unlimited secure document storage allowing you to organize and protect your most important documents.

The Vault is your first step towards becoming more active in your Covenant Wealth Portal, and we encourage you to upload your important documents and statements. We have provided a list of the most important documents below to get you started!

Now that the 2022 Tax Season has wrapped up, we encourage you to upload your 2022 Tax Returns to your secure Vault as well.

Your Covenant Wealth Portal and Vault are essential components to building out your comprehensive financial plan. The team at CWS are always here to help you if you need any assistance with your Covenant Wealth Portal!

Protect Your Important Documents:

LEGAL DOCUMENTS

- ✓ Wills
- ✓ Deeds
- ✓ Revocable & Irrevocable Trusts
- ✓ Power of Attorney
- ✓ Codicils (Supplements made to a Will)
- ✓ Living Wills/Health Directives
- ✓ Prenuptial Agreements
- ✓ Buy/Sell Agreements
- ✓ Contracts

BENEFITS

- ✓ Social Security Info
- ✓ Veteran's Administration Info
- ✓ Employment Benefits

INSURANCE POLICIES

- ✓ (Life, LTD, Disability, Medical, Car, Property)

BANK & INVESTMENT STATEMENTS

- ✓ Pensions, IRAs, Annuities, etc.
- ✓ Investment Accounts
- ✓ Stock Options/Certificates

LIABILITIES

- ✓ List of Credit Cards with Contact
- ✓ Information
- ✓ Mortgages
- ✓ Loans

TAXES

- ✓ Tax Returns
- ✓ W-2 Forms

IDENTIFICATION

- ✓ Birth Certificates
- ✓ Drivers Licenses
- ✓ Passports
- ✓ Social Security Cards

FAMILY

- ✓ Adoption Papers
- ✓ Medical Records
- ✓ Marriage License
- ✓ Pictures
- ✓ Audio Files
- ✓ Video Clips

PROPERTY

- ✓ Titles to Homes, Autos, Boats, etc.
- ✓ Warranties

Securities and advisory services offered through LPL Financial, a registered investment adviser, member FINRA/SIPC.
Throughout this newsletter, the terms “financial advisors” and “advisors” are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial.

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