

Steven Bankler, CPA, Ltd.

Client Spotlight: Stone Oak Wealth Management

Greg Thompson has long respected money and how it can catalyze greater things. He was drafted to the Dodgers right out of high school and had the foresight to save much of his signing bonus.

“I had money for the first time in my life and handed it right to a financial advisor, even though I knew nothing about investing,” he says. Thompson started studying the markets and following his investments, fitting in community and other college courses whenever he could.

“I knew that first year that if baseball didn’t work out, I would do something around finance. I was just drawn to it,” he recalls. Four years later, injuries took him off the major league fields and into the classroom at West Texas A&M University (where his future wife, Ginger, studied). He quickly finished his bachelor’s in finance with an emphasis on accounting.

He spent years honing his skills at large firms before venturing out on his own.

“I realized I had a conflict with the business model of larger firms. I wanted to assure that the needs of my clients were better met with my own service model,” Thompson explains.

During his first 17 years in business ownership, he noticed a disturbing pattern within the “traditional” way of doing things.

“The more successful we were at growing our clients’ wealth, the more fear and worry they would



show when economic storms and other threats hit,” he explains. “As I dug into that, I realized that my Christian

foundation could support a different way of doing business—helping people and families align their values with their wealth.”

This realization and renewed focus led to the creation of Stone Oak Wealth Management in 2017. Today, the firm is one of San Antonio Business Journal’s Fastest Growing Private Companies. Managing Director Donnie Laurence Jr. helps the firm remain stalwart on its impressive trajectory.

“What I love about the work that we do is that we’re able to help our clients consider the big picture—incorporating wealth building and preservation with retirement planning and estate planning—to provide the most peace of mind,” says Laurence.

Given their backgrounds, Thompson and

Laurence have high standards in accounting firms. After several separate colleagues recommended the Bankler team, Thompson decided to give them a try.

“I’ve worked with a lot of CPAs, and the common theme is that CPAs are not typically proactive,” he points out. “The Bankler team

is different in that respect. They’re always considering newer and better ways of doing things. They have a holistic approach that I really respect.”

Learn more about Stone Oak Wealth Management at stoneoakwealth.com



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