

The Onboarding Experience

Wealth Advisor Team Profile



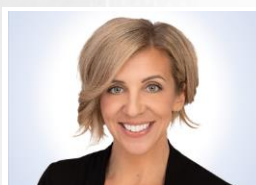
Tom Chernesky, CFP®

Managing Director, Principal



John Dorn, CFP®, CPA

Senior Vice President



Megan Mikusa

Vice President



Dan Zarzynski

Vice President

! Situation Analysis

When Tom and his team made the decision to join Robertson Stephens, the priority was clear: maintain exceptional client service while ensuring a smooth transition. With decades of experience and a loyal client base, the team needed an onboarding process that minimized disruption and maximized support.

What they found was a collaborative, hands-on approach from every department—particularly technology and operations. By working closely with leadership, the team customized their integration, stayed focused on clients, and ultimately gained the peace of mind that their future growth and succession goals would be supported by a deep, innovative pool of individuals and resources.

🎯 Rationale & Goals

- The team prioritized a well-supported onboarding process to avoid disruption and maintain the highest level of client service.
- They needed to stay focused on preserving trust and service quality for their clients throughout the transition.
- The team valued direct access to technology leaders who could customize solutions to fit their needs.
- They sought a firm with cutting-edge tools and deep planning expertise, so they could stay ahead of the curve while focusing on clients.
- Tom wanted to ensure he could spend time where it matters most, with his clients, while building a team with the resources and independence to succeed.

🏆 Results & Outcome

- Experienced a streamlined and personalized onboarding process, allowing the team to transition with confidence.
- Maintained high client satisfaction and uninterrupted service during the move.
- Collaborated directly with tech and operations leaders to optimize systems and workflows.
- Gained access to a deep bench of specialists and planning resources, keeping the team at the forefront of client service innovation.
- Established a strong foundation for long-term success, with the infrastructure and resources in place to support succession and peace of mind.