

Firm Culture

Wealth Advisor Profile

Bellevue, WA



Michael Ridgeway

Managing Director, Principal

! Situation Analysis

Mike Ridgeway sought a firm where culture would drive growth and collaboration. He wanted to work alongside experienced colleagues who could broaden his perspective and share ideas openly. At Robertson Stephens, he found a culture reinforced by responsive resources: a wealth planning center that deepens client conversations, an investment office with wide expertise, central operations and senior management that quickly engage to solve challenges, and a hands-on technology team that customizes systems to advisor needs. Together, these elements create an environment where collaboration, trust, and growth are built into the firm's foundation.

🎯 Rationale & Goals

- Mike was looking to utilize the wealth planning center as a way to open new client conversations and build trust.
- He was looking to gain access to broad investment expertise across multiple asset classes.
- He wanted to join a team of collaborators who could complement his experience and expand his perspective.
- He wanted to leverage firm resources—technology, central operations, and senior management—to focus more time on clients.
- He wanted to be part of a culture where colleagues share ideas freely and support each other's growth.

🏆 Results & Outcome

- Mike collaborates regularly with the investment office and colleagues across the firm to broaden client solutions.
- He leveraged the wealth planning center and marketing team to win new business and host curated events.
- Mike has built his business within a collaborative and supportive culture.
- He has benefited from responsive compliance processes that enable timely and effective communication with clients and prospects.
- He found that central operations and senior management could quickly engage with him to solve unexpected challenges in his practice and work toward practical solutions for his clients.