

Our Story

We are a privately-held national wealth management firm—with roots in one of the country’s most legendary tech-focused investment banks. In the 1990s, the original Robertson Stephens underwrote hundreds of the era’s most groundbreaking IPOs, helping to fuel the technology revolution.

We’re proud to build on that forward-thinking legacy—augmented with our core values of stewardship, integrity, collaboration, curiosity, and innovation. Today, we are one of the fastest-growing wealth management firms in the country.

OUR MISSION & VALUES

We aim to be the best wealth management firm. We elevate the wealth management experience with institutional-quality investment solutions, comprehensive wealth planning, and intelligent digital solutions. We are a fiduciary: that means you are always our highest priority. We partner with you to help achieve your objectives for today, for tomorrow, and across generations.

- **STEWARDSHIP**
- **INTEGRITY**
- **COLLABORATION**
- **CURIOSITY**
- **INNOVATION**

OUR AREAS OF EXPERTISE

 Airline Pilots	 Corporate Executives	 Divorce Planning	 ESG Investing	 Family Office
 Financial Education	 Multi-Generational Advisory	 Philanthropy & Foundations	 Pre- and Post-IPO	 Real Estate
 Retirement Plan Consulting	 Small Business	 Sudden Wealth & Inheritance	 Tax Management	

OUR PILLARS

Independent Fiduciary

Your interests always come first. We design tailored wealth plans and investment strategies, offering independent guidance backed by deep expertise. As your trusted advisor, we're committed to securing the best path forward for your wealth.

Wealth Planning

Wealth planning is essential to achieving your financial goals now and for your future. We combine deep expertise with a personalized approach to build a resilient plan aligned with your vision. We help you navigate challenges and shape the life you want.

Investments

A strong portfolio is key to your financial goals. We balance long-term growth with short-term opportunities, aligning investments with your risk, taxes, liquidity, and values. Our disciplined approach is designed to help grow and preserve your wealth.

Digital Solutions

Our secure platform offers real-time access to your full financial picture, with custom dashboards and detailed reporting. Whether you need a quick snapshot or in-depth analysis, you'll always have clear, up-to-date insights at your fingertips.

AT A GLANCE

- AUM:** \$8.7 bn
- Number of employees:** 119
- Number of wealth management teams:** 26
- Custodians:** Charles Schwab, Fidelity & Pershing
- Management:**

- Raj Bhattacharyya, Chief Executive Officer, Board Member
- Louis Calabrese, Chief Marketing Officer
- Vikram Chugh, Chief Operating Officer
- Michael Curley, Chief Compliance Officer
- Mallon FitzPatrick, Head of Wealth Planning
- Jeanette Garretty, Chief Economist, Head of Advisor Experience
- Stuart Katz, Chief Investment Officer
- John Murray, Managing Director, Principal
- David Westbrook, Chief Financial Officer

OUR LOCATIONS

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| 1. Austin, TX | 14. New York, NY |
| 2. Bellevue, WA | 15. North Barrington, IL |
| 3. Boise, ID | 16. Pasadena, CA |
| 4. Boston, MA | 17. Portland, OR |
| 5. Burlingame, CA | 18. San Francisco, CA (HQ) |
| 6. Colorado Springs, CO | 19. San Ramon, CA |
| 7. Denver, CO | 20. Santa Rosa, CA |
| 8. Holmdel, NJ | 21. South Kingstown, RI |
| 9. Houston, TX | 22. Sun Valley, ID |
| 10. Jackson, WY | 23. Vail, CO |
| 11. Madison, NJ | 24. West Palm Beach, FL |
| 12. Marin County, CA | 25. Westport, CT |
| 13. Menlo Park, CA | |

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