

Why Robertson Stephens?

Wealth Advisor Team Profile

San Francisco, CA



Joe Delaney

Managing Director, Principal



Kaylie Baird

Client Service Consultant

! Situation Analysis

Joe joined Robertson Stephens in 2023, transitioning from a solo practice in search of a supportive, growth-minded firm. He was looking for a firm that could handle operational and compliance tasks, allowing him to focus on supporting his clients and future growth. Drawn by the firm's robust financial planning, investment capabilities, and collaborative culture, Joe found the support he needed to expand his practice. Joe has attracted new clients and grow existing relationships by leveraging resources from the Investment Office, Wealth Planning Center, and Marketing team. With advanced tools like eMoney for planning and Flourish for cash management, Joe gained both a strong support system and a platform to thrive.

🎯 Rationale & Goals

- Joe wanted to mitigate the risks of his solo practice by joining a firm with a larger support team.
- Joe wanted to capitalize on the value of the business he built while ensuring a strong succession path.
- Joe was looking for a strong central support system, and to monetize his business while pursuing excellence in financial planning and investment capabilities.
- Joe was looking for a firm that aligns with his values and fosters a collaborative, growth-driven culture.
- Joe wanted to offload compliance and marketing duties to focus more on client relationships and business growth.

📈 Results & Outcome

- Joe gained robust support, enabling him to focus on growing his practice while securing the future value of his business.
- Joe leveraged the collaborative efforts from the central resources to bring in new assets from existing clients and new clients.
- Joe enhanced client service and wealth planning through the team's expertise, particularly with the advanced technology and capabilities.
- Joe was drawn to the firm's robust investment capabilities, including a larger alternative investment offering.
- Joe integrated Flourish cash management solutions into his practice, giving clients a streamlined option for managing cash.