

Firmwide Collaboration

Wealth Advisor Team Profile

Sun Valley, ID



Erik R. Boe

Managing Director, Principal



Julie Steinman
CFP®

Managing Director



Jack Gilligan
CFA

Senior Vice President

Support staff:

- **Eric Kiel**
Vice President
- **Kelly Woodward**
Vice President

! Situation Analysis

Our team in Sun Valley joined Robertson Stephens in 2019, transitioning from a wirehouse in search of a more entrepreneurial home where they could partner with like-minded professionals. As our first merger partner, the Sun Valley team played a pivotal role in shaping the firm's culture. As Robertson Stephens expanded, welcoming new advisors and colleagues, the Sun Valley team took the initiative to foster greater collaboration and communication. They shared their expertise in delivering exceptional client service, driving growth, and maximizing shared resources to help unify and elevate other advisors nationwide.

🎯 Rationale & Goals

- The team aimed to enhance their client service model with central resources support, which in turn provided best practices for new advisors.
- The team maintained a strong commitment to growth while upholding the highest fiduciary standards, ensuring that every decision prioritized the best interests of existing and new clients.
- The team was looking for a firm with access to robust human resources with a high level of knowledge that enhanced team dynamics.
- The team aimed to offer more private investment opportunities to their clients in collaboration with the Investment Office.

📈 Results & Outcome

- The Sun Valley team took the initiative to help new advisors quickly integrate and embrace the firm's culture through sharing best practices and resource optimization.
- They sourced investment ideas and helped roll out new strategies to the Robertson Stephens Investment Office, which were made available to all advisors and clients.
- They helped elevate the firm's wealth planning offering and encouraged their clients to maintain a comprehensive wealth plan.
- Since joining Robertson Stephens 6 years ago, they successfully established the brand in Sun Valley and tripled their assets under management.