

Partnership Culture

Wealth Advisor Team Profile

Portland, OR



Ellen Kim

Managing Director, Principal



David Reichle

Managing Director, Principal



Chris Abbruzzese

Senior Vice President

Support staff:

- **Luz Garcia**
Associate
- **Wendy Maroun**
Associate

! Situation Analysis

The Portland team joined Robertson Stephens in July 2024, managing \$360mm in advisory assets. They were looking for a firm with a strong partnership culture to work with to strategically create a succession plan, expand their team knowledge, enhance their wealth planning offering, and offload compliance, marketing, and back-office tasks. Robertson Stephens provided expertise and flexibility, allowing the team to focus on growth while maintaining client relationships. By leveraging Robertson Stephens' resources, including expertise from the other advisor teams, the Investment Office, and the Wealth Planning Center, they could improve their ability to deliver exceptional service, reinforcing the trust they've built with clients for over 20 years.

🎯 Rationale & Goals

- The Portland team sought to enhance their wealth planning capabilities to serve clients better.
- Initially, they sought continuity for clients and their careers while maintaining their team identity.
- The team needed additional bandwidth to grow their business while maintaining client relationships.
- The team was looking for a firm with a strong partnership culture to work with that offered flexibility and autonomy rather than rigid processes.
- The team wanted to offload compliance, back-office, marketing, and tech burdens to focus on client service and growth.

🏆 Results & Outcome

- The Portland team gained access to extensive expertise across 23 advisor teams with varied specialties, ensuring no client scenario goes unanswered.
- They successfully leveraged the Investment Office and Wealth Planning Center to expand their client service offerings.
- The team leveraged central human resources, finance, marketing, and technology, allowing them to focus on growth and client service.
- They improved client communication and workflow efficiency through expanded technology offerings and access to an in-house technology team.
- The team seamlessly transitioned their client relationships while maintaining their chemistry and values.