StevenDouglas®

SERVICES OVERVIEW

SEARCH DIVISION

WEALTH MANAGEMENT

The Wealth Management sector has never been more competitive than it is today, and high net worth clientele have a myriad of firms to choose from to manage their assets. In most situations, deciding on a firm will come down to a combination of relationships, performance and service levels. For firms to be competitive, it always comes down to hiring the best people in the industry.

With an average of over 15 years of specialized recruiting experience, our Wealth Management search consultants understand what our clients truly value and recognize that identifying and delivering the right candidates can impact their ability to achieve sustainable growth. Equally impressive is our RIA and IBD Practice acquisition and succession planning team. If your firm is looking to proactively identify, evaluate and ultimately acquire top quality practices or if your firm is looking for the right buyer, StevenDouglas can deliver what you need.

AREAS OF SPECIALIZATION

- EXECUTIVE LEADERSHIP & MANAGEMENT
- FINANCIAL SERVICES
- PRIVATE WEALTH MANAGEMENT
- SINGLE & MULTI-FAMILY OFFICES
- SALES MANAGERS
- SENIOR CLIENT SERVICE OFFICER
- FINANCE & ACCOUNTING
- INFORMATION TECHNOLOGY
- BUSINESS DEVELOPERS
- PORTFOLIO MANAGERS
- COMPLIANCE OFFICERS

STEVENDOUGLAS.COM

@STEVENDOUGLASHQ