

Executive Search Intelligence · Wealth Management & Private Banking

Recent Wealth Management Hires

Sixteen advisor and market-leadership appointments across wirehouses, private banks, bank-owned wealth platforms, a multi-family office and an independent challenger, with profiles of each professional and an assessment of what their new firms are investing in.

September 2026

Published by Willard Powell

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Recent hires point to a market in motion.

The sixteen professionals profiled here joined UBS, Morgan Stanley, J.P. Morgan, Bank of America Private Bank, U.S. Bank, BMO, Citizens, Raymond James, Charles Schwab, Cresset and Farther in recent weeks. Three are market leaders; thirteen are producing advisors, several of them anchoring teams with \$1 billion to \$4 billion of client assets. Together they show where the wealth industry's growth capital is being spent.

Everyone is recruiting again. Bank of America has stepped up recruiting, calling it central to growth. Raymond James is on pace for a record year and spent \$111 million on recruiting and retention in a single quarter. Citizens has added 12 private-wealth teams since 2024. Cresset opened a city with one \$4 billion hire.

Bank-owned platforms are winning share from private banks. Six of the sixteen left a private bank or trust company (J.P. Morgan Private Bank, Bank of America Private Bank, Citi Private Bank, Northern Trust, Wilmington Trust, Union Bank lineage) for a firm that pays on production, most often a wirehouse or a bank-brokerage platform. The salaried private-bank model is losing senior producers to the grid.

Independents are now credible destinations for wirehouse teams. Cresset lifted a 16-person UBS team and Farther, freshly a unicorn after a \$150 million General Atlantic round, is spending on transition packages for advisors at Fidelity, UBS and Morgan Stanley.

The management layer is being rebuilt. UBS installed a new market executive and senior market director in the South, J.P. Morgan hired a Merrill market leader for Long Beach, and Schwab added a senior regional manager for Schwab Wealth Advisory as it plans to move up to eight million self-directed clients into advice.

Florida, Southern California and the Southeast are the battlegrounds. Ten of the sixteen moves are in Florida, California or Georgia, where wealth is migrating and every firm profiled is opening or densifying offices.

AI is now part of the advisor pitch. Morgan Stanley reports 98% of advisor teams using its OpenAI-based assistant, Raymond James has rolled out a proprietary assistant and appointed a Chief AI Officer, Schwab is distributing Claude for Financial Advisors to 16,000 RIAs, and Farther's entire proposition is an AI-native platform.

	Professional	New role	Firm	Market	From
1	Ian Roth	Senior Market Director, Private Wealth Management – South Market	 UBS	Atlanta	Goldman Sachs
2	Ivan Flores	Market Director – Wealth Management	 J.P. Morgan	Long Beach, California	Merrill Lynch
3	John Paul Szabo	Senior Regional Manager – Schwab Wealth Advisory	 Charles Schwab	Jersey City, New Jersey	UBS
4	Chris MacLellan	Managing Director, Wealth Manager	 Citizens Private Wealth	Tampa	Northern Trust
5	Dayne Crist	Managing Director and Private Wealth Advisor	 UBS	Los Angeles	Bernstein Private Wealth Management
6	William Marino	Managing Director, Wealth Advisor	 Cresset	Boca Raton	UBS Financial Services
7	D. Bailey Izard	Executive Director and Private Wealth Advisor	 Morgan Stanley	Atlanta	J.P. Morgan
8	Daniel Chang	Executive Director and Financial Advisor	 Morgan Stanley	Seattle	Bank of America Private Bank
9	Andrea Freiman	Senior Vice President, Private Client Advisor	 Bank of America Private Bank	Miami / Fort Lauderdale	UBS
10	Bettina Tran	Senior Vice President, Private Wealth Advisor	 U.S. Bank	Irvine, California	BMO Wealth Management – U.S.
11	April Lidot	Senior Vice President, Senior Private Wealth Advisor	 U.S. Bank	San Diego	Wilmington Trust
12	MaryBeth Walker	Senior Vice President, Financial Advisor	 Morgan Stanley	Indianapolis	UBS
13	Joe Copeland	Senior Vice President, Wealth Management	 Raymond James	Carmel, Indiana	Morgan Stanley
14	Peter Sullivan	Senior Vice President, Wealth Advisor	 Farther	Jacksonville	Fidelity Investments
15	Jason Silberman	Wealth Advisor, Director	 BMO Wealth Management – U.S.	San Diego	Citi Private Bank
16	Corey Miller	Private Wealth Advisor, Director	 BMO Wealth Management – U.S.	Winnetka, Illinois	Capital Group Private Client Services



MARKET LEADERSHIP

Ian Roth

Senior Market Director, Private Wealth Management – South Market
UBS

Start date

August 2026

Market

Atlanta

LinkedIn

[linkedin.com/in/ian-roth-362a43b/](https://www.linkedin.com/in/ian-roth-362a43b/)

Education and credentials

MBA, Emory Goizueta; B.S.E. Civil Engineering, Economics and Architecture, Duke

Biography

Ian Roth joins UBS to run Private Wealth Management across the South market, covering Georgia, Tennessee and Arkansas, reporting to newly appointed market executive John Houlihan. He spent seven years at Goldman Sachs as Business Unit Manager for Southeast Private Wealth Management in Atlanta, effectively the chief operating officer of the region, responsible for strategy, advisor productivity and the business's day-to-day management. Before that he was a Vice President in strategy and business management at SunTrust Robinson Humphrey, a Principal Consultant in Capco's capital markets practice in New York, and an investment-banking associate covering financial institutions at Jefferies. A Duke engineer with an Emory MBA, he brings an operator's rather than a producer's profile to a market UBS is rebuilding.



Goldman Sachs



UBS

2026–

Senior Market Director,
PWM – South Market

UBS

2019–26

Business Unit Manager,
Southeast PWM

Goldman Sachs

2016–19

Vice President, Strategy &
Business Management

SunTrust Robinson Humphrey

2012–16

Principal Consultant,
Capital Markets

Capco

2010–12

Investment Banking
Associate, FIG

Jefferies



UBS

UBS's Americas wealth business has swung back to inflows in 2026 after three quarters of outflows, and CEO Sergio Ermotti has floated US acquisitions as a growth lever. On the ground the firm is investing in physical hubs and market leadership: a new Century City office in Los Angeles brings more than 225 people across Private Wealth Management, Wealth Management and the investment bank under one roof, and in the South market UBS has installed a new market executive and senior market director in Atlanta. The recent Lumina Wealth Partners hire, a \$1.4 billion team from Bernstein, is the largest of a string of Los Angeles additions this year. UBS is competing for teams with a combined pitch of global platform, private-markets access and a rebuilt US management bench.



MARKET LEADERSHIP

Ivan Flores

Market Director – Wealth Management
J.P. Morgan

Start date

August 2026

Market

Long Beach, California

LinkedIn

[linkedin.com/in/ivan-flores-627019101/](https://www.linkedin.com/in/ivan-flores-627019101/)

Education and credentials

California State Polytechnic University, Pomona

Biography

Ivan Flores takes charge of J.P. Morgan Wealth Management's advisor network in the Long Beach market after nine years at Merrill Lynch, the last five as Director and Consumer Banking & Investments Market Leader in Newport Beach, where he ran the financial-solutions advisor force embedded in Bank of America's branches. He rose through that model himself: from Relationship Manager at Bank of America in Duarte to Financial Consultant in Chandler, Arizona, then Assistant Vice President and Financial Solutions Advisor in Riverside before moving into leadership. His experience is precisely the branch-based, mass-affluent-to-affluent advisory engine J.P. Morgan is trying to scale through Chase, and his hire is a direct lift from the closest competitor's version of it.



Merrill Lynch



J.P. Morgan



J.P. Morgan Wealth Management

J.P. Morgan Wealth Management, the branch-and-office advisory business run by CEO Kristin Lemkau, has grown to about 6,000 advisors and \$1.2 trillion of assets under supervision, more than double its size at inception in 2019, with a stated long-term ambition of \$2 trillion. The model is to convert Chase's 5,000-branch retail base into advised relationships, supplemented by J.P. Morgan Financial Centers and Private Client bankers in affluent branches. The parent's roughly \$19.8 billion technology budget funds proprietary AI tools for advisors. Market directors run the local P&L, hiring, coaching and productivity of branch-based advisors, which makes them the operational core of the growth plan.

2026–	Market Director – Wealth Management	J.P. Morgan
2021–26	Director, Consumer Banking & Investments Market Leader	Merrill Lynch
2018–21	AVP, Financial Solutions Advisor	Merrill Lynch
2017–18	Financial Consultant	Merrill Lynch
2015–17	Relationship Manager	Bank of America



MARKET LEADERSHIP

John Paul Szabo

Senior Regional Manager – Schwab Wealth Advisory
Charles Schwab

Start date

August 2026

Market

Jersey City, New Jersey

LinkedIn

[linkedin.com/in/jp-szabo/](https://www.linkedin.com/in/jp-szabo/)

Education and credentials

B.S. Finance, Rochester Institute of Technology

Biography

John Paul Szabo joins Schwab Wealth Advisory, the in-house RIA at the centre of Schwab's advice strategy, as Senior Regional Manager. He arrives from UBS, where he spent 16 months as a Director and Financial Advisor Team Manager in the Wealth Advice Center in Weehawken, and before that from a nearly decade-long second stint at Morgan Stanley in New York, where he rose from Assistant Vice President to Vice President and Advisory Sales Director, managing the advisory sales desk that supports financial advisors on managed-account platforms. His career began at Morgan Stanley in Los Angeles as an institutional consulting analyst in the Graystone and Private Wealth Management groups. He has managed advisor teams and advisory-platform distribution at three of the largest firms, the combination Schwab needs as it scales advised relationships.



Charles Schwab

Schwab is the largest wealth platform in the country by client assets, at roughly \$13.1 trillion, and CEO Rick Wurster has made converting self-directed clients into advised relationships the firm's central growth thesis. At the July 2026 earnings call he disclosed a plan to move up to 31% of the retail base, some eight million clients with more than \$1 trillion of assets, into Schwab Wealth Advisory, the firm's in-house RIA, which earns roughly three times the return of a self-directed account. That requires many more advisors and regional managers, and Schwab has said it is hiring in-house wealth managers to keep books at serviceable sizes. Schwab is also bringing Claude for Financial Advisors to the 16,000 independent RIAs it custodies.



UBS



Charles Schwab

2026–	Senior Regional Manager, Schwab Wealth Advisory	Charles Schwab
2025–26	Director, Financial Advisor Team Manager (WAC)	UBS
2018–24	VP, Advisory Sales Director	Morgan Stanley
2016–18	VP, Advisory Sales Desk Manager	Morgan Stanley
2006–14	Institutional Consulting Analyst, Graystone / PWM	Morgan Stanley



MANAGING DIRECTORS

Chris MacLellan, CFA, CPWA

Managing Director, Wealth Manager
Citizens Private Wealth

Start date

August 2026

Market

Tampa

LinkedIn

[linkedin.com/in/chris-maclellan-cfa-cpwa/](https://www.linkedin.com/in/chris-maclellan-cfa-cpwa/)

Education and credentials

Yale School of Management; MBA, Crummer (Rollins College); Ohio University

Biography

Chris MacLellan co-leads MacLellan Bickle Wealth Partners, the Tampa team Citizens recently recruited to open the market; the team's clients held more than \$1 billion at its prior institution. He spent nearly eight years at Northern Trust in Tampa, most recently as Senior Vice President and Senior Portfolio Advisor managing more than \$700 million for high- and ultra-high-net-worth families, trusts and foundations, sitting on the Investment Advisory Committee and serving as a national training leader for the bank's financial-literacy curriculum. He focuses on investment strategy, manager selection, alternatives and private markets, and concentrated-stock and liquidity planning. Earlier he spent eight years in investment research at Newport Group. He holds the CFA and CPWA designations.



Northern Trust



Citizens Private Wealth

2026–	Managing Director, Wealth Manager	Citizens Private Wealth
2026	SVP, Senior Portfolio Advisor	Northern Trust
2022–26	VP, Senior Portfolio Manager	Northern Trust
2018–22	VP, Portfolio Manager	Northern Trust
2010–18	Investment Research Analyst to Senior Analyst	Newport Group



Citizens Private Wealth

Citizens Financial Group, with \$233.8 billion of assets, has made private wealth a national expansion priority since acquiring Clarfeld in 2019. The unit has added 12 advisory teams since 2024 that previously oversaw roughly \$12 billion of client assets, and recently opened Tampa by recruiting MacLellan Bickle Wealth Partners, whose clients held more than \$1 billion at their prior institution. Florida is the focus: Citizens Private Wealth now has teams in Boca Raton, Naples and Tampa, private banking in Palm Beach and West Palm Beach, and a commercial bank office in Tampa. Head of Wealth Management Paul Casey has said the bank is also targeting wealth held inside privately owned businesses, using its commercial franchise as the referral engine.



MANAGING DIRECTORS

Dayne Crist

Managing Director and Private Wealth Advisor
UBS

Start date

August 2026

Market

Los Angeles

LinkedIn

[linkedin.com/in/dayne-crist/](https://www.linkedin.com/in/dayne-crist/)

Education and credentials

B.S. Business Management and Consulting, Notre Dame; M.S. Sports Management, Kansas

Biography

Dayne Crist is one of four advisors who formed Lumina Wealth Partners at UBS, a team that managed about \$1.4 billion at Bernstein Private Wealth Management and now operates from UBS's new Century City office. He spent more than eleven years at Bernstein in Los Angeles, rising from Vice President and Financial Advisor to Principal, and advises business owners, senior executives, athletes and entertainers through liquidity events and significant wealth transitions. A former starting quarterback at Notre Dame, he began his career at Northwestern Mutual while completing graduate study at Kansas. His practice is built on the sports and entertainment wealth that concentrates in Southern California, a segment UBS's Private Wealth Management division targets explicitly.



Bernstein Private Wealth Management →  UBS

2026–	Managing Director, Private Wealth Advisor	UBS
2021–26	Principal	Bernstein Private Wealth Management
2015–21	Vice President and Financial Advisor	Bernstein Private Wealth Management
2013–15	Financial Representative	Northwestern Mutual

 UBS

UBS's Americas wealth business has swung back to inflows in 2026 after three quarters of outflows, and CEO Sergio Ermotti has floated US acquisitions as a growth lever. On the ground the firm is investing in physical hubs and market leadership: a new Century City office in Los Angeles brings more than 225 people across Private Wealth Management, Wealth Management and the investment bank under one roof, and in the South market UBS has installed a new market executive and senior market director in Atlanta. The recent Lumina Wealth Partners hire, a \$1.4 billion team from Bernstein, is the largest of a string of Los Angeles additions this year. UBS is competing for teams with a combined pitch of global platform, private-markets access and a rebuilt US management bench.



MANAGING DIRECTORS

William Marino

Managing Director, Wealth Advisor
Cresset

Start date

August 2026

Market

Boca Raton

LinkedIn

[linkedin.com/in/wmarino/](https://www.linkedin.com/in/wmarino/)

Education and credentials

B.A. History, Williams College

Biography

William "Billy" Marino recently joined Cresset as part of the 16-person Boca Raton team led by Michael Bober and Ed Ventrice, which managed roughly \$4 billion at UBS and gives Cresset its first office in the city. He spent more than ten years at UBS Financial Services, first as a Wealth Planning Associate and from 2018 as a Financial Advisor serving corporate executives, business owners, multigenerational families, foundations and professional athletes. His earlier career was institutional: fixed-income sales at RBS Greenwich Capital in Greenwich, then institutional sales roles at Noble Financial Capital Markets and National Securities in Boca Raton. A Williams College soccer and lacrosse player, he brings capital-markets fluency to a family-office platform that pitches integrated planning over pure investment management.



UBS Financial Services



Cresset



Cresset

Cresset is the fastest-scaling independent multi-family office in the country. Founded in 2017 by Eric Becker and Avy Stein, it now oversees more than \$260 billion of assets under management and advisement after acquiring Monticello Associates (\$124 billion of institutional advisement) and a series of RIAs, and it sold a sub-10% stake to Constellation Wealth Capital in 2024. Susie Cranston became CEO in March 2026. Recruiting is the core growth channel: earlier this year the firm added two Lazard Wealth managing directors in Los Angeles and New York, and it has since opened a Boca Raton office by lifting a 16-person, \$4 billion team from UBS Financial Services led by Michael Bober and Ed Ventrice. The firm markets an employee-owned, '100-year' structure to advisors leaving wirehouses.

2026–	Managing Director, Wealth Advisor	Cresset
2018–26	Financial Advisor	UBS Financial Services
2016–18	Wealth Planning Associate	UBS Financial Services
2014–16	Institutional Sales	Noble Financial · National Securities
2005–08	SVP, Fixed Income Sales	RBS Greenwich Capital



EXECUTIVE DIRECTORS

D. Bailey IZARD

Executive Director and Private Wealth Advisor
Morgan Stanley

Start date

August 2026

Market

Atlanta

LinkedIn

[linkedin.com/in/bailey-izard-099b7712](https://www.linkedin.com/in/bailey-izard-099b7712)

Education and credentials

MBA, The Wharton School; B.A. Economics, University of Virginia

Biography

Bailey IZARD moves to Morgan Stanley Private Wealth Management in Atlanta after eleven and a half years as a Managing Director at J.P. Morgan, where he advised affluent families, trusts, foundations and endowments on asset allocation, portfolio construction, tax and estate planning, concentrated-stock hedging and business-sale planning. Before J.P. Morgan he spent nine years at Bernstein Global Wealth Management, rising to Principal, and earlier co-founded Breckenridge Capital Partners and served as co-founder, director and CFO of inFusion3. His regulatory history runs back to Kidder Peabody. With more than 30 years in the industry, a Wharton MBA and a Forbes-profiled practice, he is the most experienced advisor in this cohort and one of several senior J.P. Morgan and UBS advisors Morgan Stanley has attracted in the Southeast this year.



J.P. Morgan



Morgan Stanley

2026–	Executive Director, Private Wealth Advisor	Morgan Stanley
2015–26	Managing Director	J.P. Morgan
2005–14	Vice President, then Principal	Bernstein Global Wealth Management
2002–05	Co-Founder, Director and CFO	inFusion3
2000–02	Co-Founder and Principal	Breckenridge Capital Partners



Morgan Stanley

Morgan Stanley crossed \$10 trillion in combined client assets in the second quarter of 2026, with Wealth Management alone holding about \$8.1 trillion and adding \$148 billion of net new assets in the quarter. The firm's strategy is a funnel: workplace and self-directed relationships (Solium, E*TRADE) migrate into advisor-led relationships, more than \$400 billion of which has moved since 2020. Technology is central to that thesis. AI @ Morgan Stanley Assistant, built on OpenAI models, is used by more than 98% of advisor teams, and wealth head Jed Finn has described AI 'super agents' that will build constrained portfolios on an advisor's instruction. The firm continues to recruit experienced advisors in regional markets to deepen the advice channel.



EXECUTIVE DIRECTORS

Daniel Chang

Executive Director and Financial Advisor
Morgan Stanley

Start date

August 2026

Market

Seattle

LinkedIn

[linkedin.com/in/daniel-chang-53018730/](https://www.linkedin.com/in/daniel-chang-53018730/)

Education and credentials

Washington State University

Biography

Daniel Chang joins Morgan Stanley in Seattle after eighteen and a half years at Bank of America Private Bank, where he was Managing Director and Senior Portfolio Manager, constructing and managing discretionary portfolios for high- and ultra-high-net-worth clients within the bank's fiduciary model. The move is a shift in model as much as firm: from a salaried portfolio-management seat inside a private bank to an advisor practice on Morgan Stanley's grid, with the firm's open-architecture platform, alternatives shelf and AI tooling behind it. A Washington State University graduate, he is one of a small number of senior private-bank portfolio managers to make that transition in the Pacific Northwest this year, and his tenure gives him one of the longest single-firm client relationships in this report.



Bank of America Private Bank



Morgan Stanley

2026–

Executive Director,
Financial Advisor

Morgan Stanley

2008–26

Managing Director, Senior
Portfolio Manager

Bank of America Private Bank



Morgan Stanley

Morgan Stanley crossed \$10 trillion in combined client assets in the second quarter of 2026, with Wealth Management alone holding about \$8.1 trillion and adding \$148 billion of net new assets in the quarter. The firm's strategy is a funnel: workplace and self-directed relationships (Solium, E*TRADE) migrate into advisor-led relationships, more than \$400 billion of which has moved since 2020. Technology is central to that thesis. AI @ Morgan Stanley Assistant, built on OpenAI models, is used by more than 98% of advisor teams, and wealth head Jed Finn has described AI 'super agents' that will build constrained portfolios on an advisor's instruction. The firm continues to recruit experienced advisors in regional markets to deepen the advice channel.



SENIOR VICE PRESIDENTS

Andrea Freiman

Senior Vice President, Private Client Advisor
Bank of America Private Bank

Start date

August 2026

Market

Miami / Fort Lauderdale

LinkedIn

[linkedin.com/in/andreafreiman/](https://www.linkedin.com/in/andreafreiman/)

Education and credentials

B.A. Economics, The Wharton School

Biography

Andrea Freiman joins Bank of America Private Bank in South Florida as a Senior Vice President and Private Client Advisor after nearly three years as a Senior Vice President at UBS. The bulk of her career was at J.P. Morgan Private Bank in Miami and Fort Lauderdale, where over ten and a half years she advanced from analyst to Vice President and then Executive Director, serving high- and ultra-high-net-worth families in one of the most competitive private-banking markets in the country. She began at UBS in New York as an analyst after graduating from Wharton. Her return to a bank-integrated private-bank model, with banking, lending, trust and investment management under one relationship, follows Bank of America's decision to recruit experienced advisors aggressively again.



UBS



Bank of America Private Bank

2026–	SVP, Private Client Advisor	Bank of America Private Bank
2023–26	Senior Vice President	UBS
2022–23	Executive Director	J.P. Morgan Private Bank
2013–22	Analyst to Vice President	J.P. Morgan Private Bank
2012–13	Analyst	UBS



Bank of America Private Bank

Bank of America's Global Wealth division, spanning Merrill and the Private Bank, holds roughly \$4.9 trillion of client balances and is the most profitable per dollar of the large wealth franchises. Having largely stepped away from conventional recruiting in 2017, the bank has reversed course: co-president Dean Athanasia told investors in March 2026 that 'more aggressive recruiting' is central to growing the 15,000-advisor force, backed by high-end transition packages. The Private Bank itself, led by Katy Knox, serves ultra-high-net-worth families from more than 100 offices, reported 93% of clients digitally active in 2025, and is deploying AI to expand advisor capacity. Its 2026 Study of Wealthy Americans found 77% of UHNW respondents see more opportunity in private markets than public.



SENIOR VICE PRESIDENTS

Bettina Tran, CFP®, CEPA

Senior Vice President, Private Wealth Advisor
U.S. Bank

Start date

August 2026

Market

Irvine, California

LinkedIn

[linkedin.com/in/bettina-tran-cfp-cepa-59a3363a/](https://www.linkedin.com/in/bettina-tran-cfp-cepa-59a3363a/)

Education and credentials

Personal Financial Planning, UC Irvine; B.B.A. Finance, Concord University

Biography

Bettina Tran brings more than 17 years of Orange County private-banking relationships to U.S. Bank Private Wealth Management. She spent three years at BMO Wealth Management in Newport Beach, arriving through the Bank of the West acquisition as a Senior Private Client Advisor and Vice President and advancing to Director and Wealth Advisor. Before that she was a Regional Bank Private Banker at Wells Fargo for thirteen years across Fountain Valley and McLean, Virginia, with a period as a Wells Fargo Advisors financial advisor. A Certified Financial Planner and Certified Exit Planning Advisor, she specialises in holistic planning for business owners approaching a sale. Her move is one of two BMO-to-U.S. Bank transitions in Southern California this summer, as both banks compete for the same affluent business-owner segment.



BMO Wealth Management – U.S.



U.S. Bank

2026–	SVP, Private Wealth Advisor	U.S. Bank
2024–26	Director, Wealth Advisor	BMO Wealth Management – U.S.
2023–24	Private Wealth Advisor	BMO Wealth Management – U.S.
2022–23	Senior Private Client Advisor, VP	Bank of the West
2009–22	Regional Bank Private Banker	Wells Fargo



U.S. Bank

U.S. Bank, under chair and CEO Gunjan Kedia, has made wealth a growth engine alongside payments and capital markets. The bank has delivered seven consecutive quarters of positive operating leverage, raised its 2026 revenue-growth outlook to 7–9%, and is completing the BTIG acquisition to deepen institutional and high-net-worth capabilities. In wealth specifically it runs a segmented model, Affluent, Private Wealth Management and Ascent Private Capital Management for UHNW families, and has created a President of Emerging Affluent Wealth Management to build digital-first offerings for new investors. Private Wealth Advisor hiring across southern California and the Sun Belt continues, with a \$200 million annual branch investment in California, Phoenix and Denver.



SENIOR VICE PRESIDENTS

April Lidot, AWMA

Senior Vice President, Senior Private Wealth Advisor
U.S. Bank

Start date

August 2026

Market

San Diego

LinkedIn

[linkedin.com/in/april-lidot-awma-91471a11/](https://www.linkedin.com/in/april-lidot-awma-91471a11/)

Education and credentials

Accredited Wealth Management Advisor

Biography

April Lidot joins U.S. Bank in San Diego with nearly two decades of private-banking experience in Southern California. She spent two years at Wilmington Trust as Senior Vice President and Senior Wealth Advisor and, before that, two years at Comerica as Senior Vice President and Senior Private Wealth Advisor in its Private Wealth Management group. The foundation of her book was built over almost fifteen years at Union Bank, nine of them as Vice President and Private Wealth Advisor in The Private Bank, acting as consultative lead for high-net-worth families, entrepreneurs and business owners and coordinating banking, credit, trust and investment specialists. Her move consolidates several years of transitions triggered by the Union Bank and Bank of the West sales into U.S. Bank's segmented private-wealth model.



Wilmington Trust



U.S. Bank



U.S. Bank

U.S. Bank, under chair and CEO Gunjan Kedia, has made wealth a growth engine alongside payments and capital markets. The bank has delivered seven consecutive quarters of positive operating leverage, raised its 2026 revenue-growth outlook to 7–9%, and is completing the BTIG acquisition to deepen institutional and high-net-worth capabilities. In wealth specifically it runs a segmented model, Affluent, Private Wealth Management and Ascent Private Capital Management for UHNW families, and has created a President of Emerging Affluent Wealth Management to build digital-first offerings for new investors. Private Wealth Advisor hiring across southern California and the Sun Belt continues, with a \$200 million annual branch investment in California, Phoenix and Denver.

2026–	SVP, Senior Private Wealth Advisor	U.S. Bank
2024–26	SVP, Senior Wealth Advisor	Wilmington Trust
2022–24	SVP, Senior Private Wealth Advisor	Comerica Bank
2013–22	VP, Private Wealth Advisor – The Private Bank	Union Bank
2007–13	Earlier roles	Union Bank



SENIOR VICE PRESIDENTS

MaryBeth Walker

Senior Vice President, Financial Advisor
Morgan Stanley

Start date

August 2026

Market

Indianapolis

LinkedIn

[**linkedin.com/in/marybethwalkerm/**](https://www.linkedin.com/in/marybethwalkerm/)

Education and credentials

MBA, University of Iowa; B.A. Journalism, University of Illinois Urbana-Champaign

Biography

MaryBeth Walker joins Morgan Stanley in Indianapolis after nineteen years as Senior Vice President of Wealth Management at UBS Financial Services, where she was named a Forbes Top Women Wealth Advisor in Indiana in each of 2023, 2024, 2025 and 2026. Before UBS she spent nine years at Fifth Third Bank. Her practice centres on business-sale planning, philanthropic strategy and the financial implications of major life transitions for families and executives. A journalism graduate of Illinois with an Iowa MBA, she is a long-standing figure in Indianapolis civic life, serving as Board Member Emeritus of the Phoenix Theatre. Her move, alongside Joe Copeland's departure from Morgan Stanley to Raymond James in the same city, illustrates how actively the Indianapolis advisor market is being contested.



UBS



Morgan Stanley

2026–

SVP, Financial Advisor

Morgan Stanley

2007–26

SVP of Wealth Management

UBS

1998–2007

Wealth management roles

Fifth Third Bank



Morgan Stanley

Morgan Stanley crossed \$10 trillion in combined client assets in the second quarter of 2026, with Wealth Management alone holding about \$8.1 trillion and adding \$148 billion of net new assets in the quarter. The firm's strategy is a funnel: workplace and self-directed relationships (Solium, E*TRADE) migrate into advisor-led relationships, more than \$400 billion of which has moved since 2020. Technology is central to that thesis. AI @ Morgan Stanley Assistant, built on OpenAI models, is used by more than 98% of advisor teams, and wealth head Jed Finn has described AI 'super agents' that will build constrained portfolios on an advisor's instruction. The firm continues to recruit experienced advisors in regional markets to deepen the advice channel.



SENIOR VICE PRESIDENTS

Joe Copeland

Senior Vice President, Wealth Management
Raymond James

Start date

August 2026

Market

Carmel, Indiana

LinkedIn

[linkedin.com/in/joe-copeland-5429a75b/](https://www.linkedin.com/in/joe-copeland-5429a75b/)

Education and credentials

Finance, Franklin College

Biography

Joe Copeland brings twenty years of Indianapolis advisory experience to Raymond James's employee channel in Carmel. He spent nine years at Morgan Stanley as First Vice President and Financial Advisor, building a practice focused on athletes, founders and business owners, family offices, technology entrepreneurs, physicians, executives and entertainers. Before Morgan Stanley he spent nine and a half years at Stifel Nicolaus and began his career at Merrill Lynch working with foundations, endowments and individuals. A Franklin College finance graduate and captain of its men's soccer team, he moves to a firm that is on pace for a record recruiting year and that competes for wirehouse advisors on payout, culture and a technology budget above \$1.1 billion a year.



Morgan Stanley



Raymond James

2026–	SVP, Wealth Management	Raymond James
2017–26	First Vice President, Financial Advisor	Morgan Stanley
2008–17	Financial Advisor	Stifel Nicolaus
2006–08	Financial Advisor	Merrill Lynch



Raymond James

Raymond James is on pace for a record recruiting year. In its fiscal third quarter it reported Private Client Group assets of \$1.86 trillion, up 18% year on year, and fee-based assets of \$1.15 trillion; in the prior quarter it recruited advisors with \$141 million of trailing production and \$21 billion of assets while spending \$111 million on recruiting and retention. CEO Paul Shoukry has said the firm prefers to recruit 'one-by-one' rather than buy firms, and it spends more than \$1.1 billion a year on technology, including a proprietary AI assistant rolled out to advisors in 2026 and newly created Chief AI Officer and Head of AI Strategy roles. Its employee channel competes directly with wirehouses in Midwestern markets such as Indianapolis.



SENIOR VICE PRESIDENTS

Peter Sullivan, CFP®, CPWA®

Senior Vice President, Wealth Advisor
Farther

Start date

August 2026

Market

Jacksonville

LinkedIn

[linkedin.com/in/peter-sullivan-cfp-cpwa-32237312/](https://www.linkedin.com/in/peter-sullivan-cfp-cpwa-32237312/)

Education and credentials

CPWA, Chicago Booth Executive Education; Financial Planning Certificate, Florida State; B.S. Economics, Wisconsin-La Crosse

Biography

Peter Sullivan leaves Fidelity after nearly twenty years to join Farther, the venture-backed, technology-native wealth platform, as Senior Vice President and Wealth Advisor in Jacksonville. At Fidelity he was Vice President and Financial Consultant for six and a half years and, before a brief period as Regional Vice President in Fisher Investments' private client group in 2019, a Vice President and Financial Planner for more than twelve years. He holds the Certified Financial Planner and Certified Private Wealth Advisor designations, the latter through Chicago Booth. His move is the kind Farther's May 2026 Series D was raised to fund: an experienced, credentialed advisor with an established affluent book leaving a large incumbent for an independent platform that offers equity and integrated technology.



Fidelity Investments



Farther

2026–	SVP, Wealth Advisor	Farther
2019–26	VP, Financial Consultant	Fidelity Investments
2019	RVP, Private Client Group	Fisher Investments
2006–19	Vice President, Financial Planner	Fidelity Investments



Farther

Farther is the venture-backed challenger to the wirehouses. Founded in 2019 by Taylor Matthews and Brad Genser, formerly of Goldman Sachs's AI for private wealth group, it raised a \$150 million Series D led by General Atlantic in May 2026, reaching unicorn status and more than \$270 million of total capital. The firm reports more than \$23 billion of recruited assets and is tripling year on year. Its Intelligent Wealth Platform integrates portfolio management, asset location, tax optimisation, execution and private-markets access in one system, and the new capital is explicitly earmarked for recruiting advisors managing \$100 million or more from UBS, Morgan Stanley, Merrill and Fidelity with transition support and equity.



DIRECTORS

Jason Silberman

Wealth Advisor, Director
BMO Wealth Management – U.S.

Start date	Market	LinkedIn
August 2026	San Diego	linkedin.com/in/silberman/
Education and credentials		
B.S. Finance, University of Arizona (Eller); Personal Financial Planning, UC Irvine; Management and Strategic Leadership, Illinois		

Biography

Jason Silberman joins BMO Wealth Management in San Diego as a Director and Wealth Advisor, four months after the bank installed Ali Nafii to lead the market. He spent four years at Citi Private Bank as a Director and Private Banker in San Diego, and before that five years as Senior Vice President and Private Wealth Advisor at U.S. Bank in San Diego County, following advisor roles at Citi in Santa Monica and at Union Bank. His career spans wirehouse, private-bank and regional-bank models across Southern California. He is BMO's second experienced private-wealth hire in the market this year and reflects the bank's strategy of pairing new market leadership with producing advisors who already hold relationships with local business owners.

 Citi Private Bank →  BMO Wealth Management – U.S.

2026–	Wealth Advisor, Director	BMO Wealth Management – U.S.
2022–26	Director, Private Banker	Citi Private Bank
2017–22	SVP, Private Wealth Advisor	U.S. Bank
2014–17	VP, Financial Advisor	Citi
2012–14	VP, Private Wealth Advisor	Union Bank

 BMO Wealth Management – U.S.

BMO is pursuing a densification strategy in the United States: extending wealth management into markets where its commercial bank already has deep relationships, with California the priority. Michele Havens, head of U.S. Wealth Management, framed the approach in April 2026 when BMO hired Northern Trust's Ali Nafii to lead San Diego, and the West region under Clark Pingree has been adding private wealth advisors and directors through 2026. The proposition to advisors is a bank-integrated platform, trust and estate capability through BMO Private Bank, and warm introductions from commercial banking to business-owner clients. The two recent director-level hires profiled here, in Southern California and Chicago's North Shore, follow that playbook.



DIRECTORS

Corey Miller, MBA

Private Wealth Advisor, Director
BMO Wealth Management – U.S.

Start date

August 2026

Market

Winnetka, Illinois

LinkedIn

[linkedin.com/in/corey-miller-mba-4043043/](https://www.linkedin.com/in/corey-miller-mba-4043043/)

Education and credentials

MBA Accounting, Roosevelt University; CFP coursework, DePaul University

Biography

Corey Miller joins BMO Wealth Management on Chicago's North Shore after nearly fifteen years at Capital Group Private Client Services, where he progressed from Senior Client Relationship Associate to Assistant Vice President, Vice President and Senior Client Relationship Specialist, and most recently Client Relationship Manager, holding the Series 65 and leading asset-allocation, wealth-transfer and gifting work for private clients. Earlier he was a client associate at RMB Capital Management, an analyst at GEI Financial Services and a private client associate at Bernstein. His move from a relationship-management seat at an asset manager to a producing Private Wealth Advisor role at a bank is a step up in scope, and BMO gains an advisor with deep familiarity with the Capital Group client base in Chicago.



Capital Group Private Client
Services



BMO Wealth
Management – U.S.

2026– Private Wealth Advisor, Director BMO Wealth Management – U.S.

2025–26 Client Relationship Manager Capital Group Private Client Services

2022–25 VP, Senior Client Relationship Specialist Capital Group

2018–22 AVP, Relationship Specialist Capital Group



BMO Wealth Management – U.S.

BMO is pursuing a densification strategy in the United States: extending wealth management into markets where its commercial bank already has deep relationships, with California the priority. Michele Havens, head of U.S. Wealth Management, framed the approach in April 2026 when BMO hired Northern Trust's Ali Nafii to lead San Diego, and the West region under Clark Pingree has been adding private wealth advisors and directors through 2026. The proposition to advisors is a bank-integrated platform, trust and estate capability through BMO Private Bank, and warm introductions from commercial banking to business-owner clients. The two recent director-level hires profiled here, in Southern California and Chicago's North Shore, follow that playbook.

Method and sources

About the profiles. Biographies are built from the professionals' LinkedIn profiles as supplied to Willard Powell, cross-checked against press announcements and public sources. Profiles are grouped by the level of the role now held: market leadership, Managing Directors, Executive Directors, Senior Vice Presidents and Directors. Firm commentary draws on company disclosures, earnings calls and press coverage through 23 September 2026; sources are listed at the end.

1. Cresset expands to Boca Raton with \$4B UBS team — Cresset / PR Newswire / WealthManagement.com, 25 Aug 2026
2. Citizens expands Private Wealth presence in Florida with Tampa team — Citizens Financial Group / InvestmentNews / Tampa Bay Business & Wealth, 26 Aug 2026
3. UBS hires four financial advisors in Los Angeles; UBS adds advisors in Los Angeles and Southern states — Business Wire / Family Wealth Report / WealthManagement.com, 31 Aug 2026
4. MaryBeth Walker advisor profile — Morgan Stanley Wealth Management, Aug 2026
5. D. Bailey Izard profile — Forbes / FINRA BrokerCheck
6. BofA co-president plans 'more aggressive' advisor recruiting — AdvisorHub, 11 Mar 2026
7. 2026 Bank of America Private Bank Study of Wealthy Americans — Bank of America Newsroom, 17 Jun 2026
8. U.S. Bancorp: Q2 2026 results; Kedia named Chairman; Emerging Affluent Wealth launch — U.S. Bank / Simply Wall St / Simplify, 2026
9. BMO Wealth Management names Ali Nafii to lead San Diego market — Business Wire / InvestmentNews, 8 Apr 2026
10. Morgan Stanley crosses \$10 trillion in client assets; AI agents and the wealth funnel — Morgan Stanley Q2 2026 release / CNBC, 3 Jun 2026 / Axis Intelligence, Aug 2026
11. Behind the AI 'super agents' coming to Morgan Stanley — Financial Planning, 11 Feb 2026
12. J.P. Morgan Wealth Management: 133 Forbes honorees; Kristin Lemkau profile — J.P. Morgan, 2026 / Chase Media Center
13. JPMorgan adds millionaire wealth offering to branches — WealthManagement.com / Bloomberg, 24 Sep 2025
14. Raymond James on track to top advisor recruiting record — Financial Planning, 23 Jul 2026; AdvisorHub, 23 Apr 2026
15. Raymond James Investor Day 2026 summary; FY2025 results — Quartr, Jun 2026; SEC filing, Oct 2025
16. Schwab plan to convert self-directed clients into Schwab Wealth Advisory — RIABiz, 22 Jul 2026
17. Schwab 2026 Investor Day; Claude for Financial Advisors partnership — About Schwab, 2026
18. Farther raises \$150M Series D led by General Atlantic — General Atlantic / citybiz / Private Markets Minute, May–Jun 2026

Biographical detail is drawn from LinkedIn profiles supplied to Willard Powell for each professional. Public-source material has been paraphrased and summarised; figures are as reported by the cited outlets and have not been independently audited. Client-asset figures refer to assets at the professional's prior institution as reported by the hiring firm. This report is for the information of Willard Powell clients and is not investment advice.

Willard Powell

Willard Powell advises boards, chief executives and heads of wealth on senior advisor, market-leadership and executive appointments across wealth management, private banking and asset management. To discuss any of the professionals or firms in this report, or the wider market for wealth talent, visit www.willardpowell.com.