WEALTH MANAGEMENT

The Lyneer Executive Search Strategy™ for wealth management

Finding a technically qualified candidate isn't the hard part. Finding the finance executive who fits your firm's values, vision, and client philosophy is what drives long-term success.

01

Technical expertise in wealth finance

Portfolio management analytics, advisory operations, fee structures, GIPS compliance, private funds, or alternative assets. Fluency with platforms like Black Diamond, Addepar, eMoney, or Tamarac.

02

Client-centric business acumen

Alignment with client experience, fiduciary standards, and a personalized advisory model. Comfort working with advisors, investment committees, and family stakeholders.

03

Cultural & philosophy alignment

Fit with your firm's values and service ethos, boutique or institutional. Communication and leadership that complements existing partners.

04

Career trajectory & succession potential

Motivation to grow into leadership, partner-track, or succession-based roles, not just fill a seat.

> "We engaged Lyneer to find a controller who could grow into our COO. They delivered a finance leader who's become essential to our operations and our succession plans."
>
> FOUNDING PARTNER, $2B RIA

FREQUENTLY ASKED QUESTIONS

What types of roles does Lyneer fill for wealth management firms?

CFOs, COOs, controllers, FP&A directors, and heads of finance, across boutique and institutional firms, often with succession potential or partner-track intent.

Who is the strategy best suited for?

RIAs managing $500M to $10B AUM, multi-family offices, PE-backed platforms, and wealth-tech firms scaling operations or preparing for M&A.

How is this different from traditional recruiting?

We evaluate culture, long-term alignment, and client-philosophy fit alongside technical skill. That's what drives retention and promotion.

Ready to apply the strategy to your next hire?

Schedule a 15-minute consult with our team.

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