

Our Story

Robertson Stephens had origins in San Francisco, California, and rapidly grew into one of the more storied and successful investment banking firms in the financial services industry. Building on that legacy we are a privately-held, boutique wealth management firm today servicing entrepreneurs, business owners, executives, family offices, and institutions. We strive to provide a highly personalized client experience that combines the high touch of a specialized firm with deep and extensive resources. Our clients have access to institutional-quality public and private investment solutions, comprehensive wealth planning, and intelligent digital solutions, all within a fiduciary relationship that they deserve.

Our Mission & Values

Our mission is to transform the wealth management experience by delivering institutional-quality investment solutions, comprehensive wealth planning, and intelligent digital solutions all within a fiduciary relationship where you are our highest priority.

Integrity

Transparency

Collaboration

Innovation

Our Pillars

INDEPENDENT FIDUCIARY STANDARD

Living the standard

As a fiduciary, we place your interests above our own as we design and implement customized wealth solutions on your behalf.

COMPREHENSIVE WEALTH PLANNING

Tackling financial complexities

We collaborate with you to implement long-lasting financial plans that incorporate your needs, goals and aspirations.

INSTITUTIONAL INVESTMENT STRATEGY

Institutional quality with boutique creativity

Achieve your short-term and long-term investment goals through our expertise in traditional and alternative investments.

INTELLIGENT DIGITAL SOLUTIONS

Harnessing your wealth

Our client interface enables you to monitor your wealth through personalized dashboards and comprehensive reporting, all on a secure platform.

Our Areas of Expertise



Our Locations



1. Austin, TX
2. Bellevue, WA
3. Boise, ID
4. Boston, MA
5. Burlingame, CA
6. Holmdel, NJ
7. Houston, TX
8. Madison, NJ
9. Marin County, CA
10. Menlo Park, CA
11. New York, NY
12. Pasadena, CA
13. San Francisco, CA (HQ)
14. San Ramon, CA
15. Santa Rosa, CA
16. Sun Valley, ID
17. Vail Valley/Denver, CO

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