SHEILA A. RYAN

sryan@nextwaverising.com ⬩ (941) 302-2202

SENIOR WEALTH MANAGEMENT EXECUTIVE

High Performance Teams ⬩ Mergers & Acquisitions ⬩ Operations Oversight ⬩ Process Improvements

Hands-on executive with extensive success partnering across the wealth management ecosystem to create scalable methodologies and operating frameworks that optimize performance. Takes a holistic organizational approach while steering companies through periods of rapid growth. Builds, coaches, and leads diverse advisor and support teams that strategically align services, people, processes, and technology to drive exceptional client experience. Promotes a culture based on accountability, collaboration, and client-centric values.

Core Competencies

- Resource & Strategic Planning
- Financial Forecasting
- Budget Tracking
- Change Management
- System Integration & UX
- Automated Processes/Efficiency
- Team Leadership & Engagement
- Performance Metrics
- Effective Communications

Career Highlights with Focus Partners Wealth

- Named President of Wealth Management of The Colony Group (TCG) in 2024 prior to the merger & rebranding of TCG with Buckingham Strategic Wealth to form Focus Partners Wealth (FPW):
    - Promotion featured in March 2025 Citywire article: Colony-Names-New-President.
- Recruited to core leadership team at TCG in 2018 to integrate 10+ M&A transactions during period of rapid growth.
- Played key role growing AUM from $5B with 50+ advisors (2018) to $30B enterprise with 175 advisors (2024).
- Partnered with high growth advisor teams to achieve $329M in net new assets (2024):
    - Defined target client segmentation and optimal servicing/staffing models, including level of resources, technical skills, and relationship management skills.
    - Model enabled business to scale while achieving high service levels for existing clients.
- Worked with Chief Investment Officer to create 10-person trading operations team to manage client portfolios:
    - Designed strategy to transition 800+ individual allocations to 28 models with customization capabilities.
    - Innovation shifted 75% of trading volume from portfolio managers and researchers to new trading team.

Professional Experience

FOCUS PARTNERS WEALTH, Boston, MA **2018 to 2025**

FPW is a large national independent wealth management & investment advisory firm with $500B AUM.

Division President – Colony Wealth Management (CWM) – TCG/FPW 2024 to 2025

Led high-performing advisor organization with focus on service excellence and rapid growth through numerous M&As.

- Assessed advisors' business development and servicing strengths; defined roles, aligned resources, and built appropriate support structure to help meet/exceed goals.
- Drove strategies to meet and anticipate clients' evolving needs; developed and provided client service resources across advisor teams based on client segments and growth opportunities.

Managing Director – Wealth Management Strategy – TCG 2022 to 2023

Partnered with leadership to identify success factors for high growth advisors and teams.

- Designed performance statistics to better measure and track KPIs, growth rates, cost of service, profitability, and client retention rates.
- Created template that optimized advisor team structure and capacity planning based on services provided and anticipated growth.

Managing Director – Client Service & Operations – TCG 2021 to 2022

Redesigned advisor and client support models across firm to enable advisors to focus on developing new relationships while continuing to service existing clients.

FOCUS PARTNERS WEALTH – *continued*

- Adopted central pod structure across client service, operations, trading, compliance, and billing teams to streamline processes, set standards, and implement controls:
    - Project reduced average client onboarding time from seven to three days; accelerated quarterly billing from 45 to 15 days; improved reporting data integrity by 20%; and minimized trade errors by 25%.
- Crafted SOPs across roles and software systems to create consistent client experience while streamlining integration of newly merged firms.

Vice President – Digital Experience – TCG 2018 to 2020

Led implementation of several software platforms to drive growth while enhancing advisor/client experience.

- Overhauled advisor/client software, including CRM, financial planning, reporting, trading, and proposals:
    - Innovation enabled migration/integration of 10+ acquisitions into single enterprise platform.
    - Cut technology budget by 50% saving $1M+ via system consolidation and contract renegotiations.
- Earned 2020 Above and Beyond recognition.

LORING WARD, San Jose, CA (Acquired & rebranded by Bucking Asset Management in 2018) **2014 to 2018**

LW was a national $20B asset management firm with over 1200 advisors and 50,000 accounts on its platform.

Consultant/Program Manager 2016 to 2018

Directed multi-year $3M migration from customized trading & portfolio accounting platform to cutting edge SaaS solution.

- Partnered with internal team leaders (advisor relations, client service, trading, billing, and marketing) and 3rd party consultants to transition all LW advisory firms and their accounts from legacy platform to new system:
    - New system included standard models and automated fee schedules that reduced labor time and eliminated significant manual servicing of clients' custom investment allocations and billing structures.
    - Traveled nationally with advisor relations team to drive adoption of new system/processes.
    - Led and collaborated with staff and their clients to manage change and ease transition.

Vice President, Advisor Relations – Business Planning & Execution 2014 to 2016

Established cross-departmental partnerships to coordinate and execute daily business operations and support growth.

- Identified gaps and initiated process improvements that enhanced operations:
    - Assessed and upgraded the skills and services provided by internal sales team.
    - Reduced headcount by 50% while saving the company $500K annually.
- Won two Corporate Citizen awards for Innovative Problem Solving (2015) and Execution & Teamwork (2014).

CHARLES SCHWAB, Boston, MA **2011 to 2013**

Charles Schwab is a Fortune 500 company providing clients with brokerage, banking, and financial advisory services.

Senior Team Manager – Business Consulting Services, Northeast Region

Prioritized existing clients while allocating resources to capitalize on business development opportunities.

- Created scalable frameworks that helped national consulting team analyze clients' operations:
    - Designed management plans and presented recommendations to key stakeholders.
- Recipient of You Make a Difference and Key Contributor awards, 2013.

Education

Master of Arts, Organizational Psychology, concentration in Talent Management – William James College, Boston, MA

Master of Business Administration, concentration in Finance & Accounting – Boston College, Chestnut Hill, MA

Bachelor of Science, concentration in Finance – Babson College, Wellesley, MA

Certifications

Certified Change Management Professional (CCMP) – Association for Change Management

Certified Project Management Professional (PMP) – Project Management Institute

Certified ScrumMaster (CSM) – Scrum Alliance