



Pathstone Appoints Eddie Brown as Chief Growth Officer, Tapping Former Schwab Family Office Industry Executive

Brown's move signals a bold expansion strategy as Pathstone ramps up industry-leading Family Office Services for Ultra-High-Net Worth (UHNW) clients

Englewood, N.J. (Nov. 14, 2024) – [Pathstone](#), a nationally recognized advisory firm offering highly customized investment advice and bespoke family office services focused on the ultra-high net worth, proudly announces it has appointed Eddie Brown as Chief Growth Officer. With more than 25 years of experience in the family office and wealth management space, Brown joins Pathstone with a mission to fuel strategic growth and innovation strengthening Pathstone's position in the industry.

In his new role as Chief Growth Officer, Brown will lead overall organic growth strategy and spearhead business development priorities by creating innovative marketing strategies and channel expansion across the firm's three subsidiaries: Pathstone Family Office, Willow Street Trust Company, and Advisor Partners. Brown's diverse experience aligns perfectly with Pathstone's core mission and values enabling him to navigate the complexity of the financial services industry while elevating its client-centric culture.

"Pathstone's rise in the industry has been driven by a forward-looking vision and strategy with an unwavering commitment to exceed client expectations and provide a truly differentiated family office experience. We are thrilled to have to Eddie join our executive management team and help lead our next chapter of growth," said Matt Fleissig, CEO and Co-Founder of Pathstone. "We have an extensive history and relationship with Eddie dating back to our launch in 2010, where his advocacy and expert guidance has been instrumental to our firm's journey and success. His decision to join our team serves as a significant endorsement of our vision and values. He has an impressive track record building high-performing wealth and family office practices which aligns with our ambitions to innovate and grow as a first of its kind company, servicing clients with complex needs."

In his most recent role, Brown served as a Managing Director, member of the Schwab Advisor Services leadership team and Head of Schwab Advisor Family Office and the Premier Wealth Group. Most notably, Brown established the family office business at Schwab to be a nationally recognized brand in the marketplace with top industry talent serving single and multi-family offices. Prior to Schwab, he was a senior leader at Fidelity Family Office Services driving the strategy, sales and relationship support for top multi-family offices, single family offices and wealthy families. While at Fidelity, Brown was responsible for establishing Pathstone as one of the firm's first multi-family office relationships. When he was recruited away to Schwab, the Pathstone relationship followed and expanded significantly which is a testament to longstanding trust, belief and support of Pathstone's approach.

"We are excited to have Eddie join us. He has a well-established reputation and extensive network of relationships in the family office community. As a respected thought leader with ultra-high net worth families, family offices, institutions and industry professionals, his vision and insight will supercharge our culture of innovation, trust and excellence in serving our clients" stated Kelly Maregni, President of Pathstone.

"For more than a decade, I have witnessed Pathstone's evolution and have been inspired by the firm's vision, strategy and execution which has redefined family office services. I am grateful and humbled for the leadership opportunities I have had and am thrilled to bring my energy and extensive experience in family offices services to Pathstone as the Chief Growth Officer," said Eddie Brown, CGO of Pathstone. "From my perspective, Pathstone is clearly at the forefront of the industry and innovating how to best serve ultra-high net worth families and family offices. I'm excited to join this amazing team and confident we will have a significant, positive impact on our clients while achieving ambitious goals together."

Brown holds a Bachelor of Arts degree in Business and Economics from St. Andrews University and is a graduate of the Wharton School of Executive Education through the Securities Industry Institute. Brown and his wife, Wendy reside in Scottsdale, Arizona and is the proud father of two children, Haley and Nic. To learn more about Pathstone's depth and breadth of services, visit www.pathstone.com.

About Pathstone

Pathstone is a client-centric, partner-owned firm dedicated to serving ultra-high net worth families, single family offices, and foundations and endowments. With a depth and breadth of expertise, our advisors provide a holistic suite of family office services, tailored wealth management, investment advisory, trust and estate planning, tax, bill pay, and other lifestyle management services, all delivered in-house. With offices across the United States, we focus on an advocacy-driven approach, empowering our clients to realize their unique long-term goals and sustain their legacy. Discover more at www.Pathstone.com.

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