



Operator-Led *Advisory Services* for Wealth Advisory Firms, Multi-Family Offices & Strategic Investors

Our Why

The entire wealth advisory industry is experiencing a period of tremendous growth and structural evolution. Firms are scaling faster through acquisition, capital partnerships, and expanding service models for ultra-high-net-worth clients. As organizations grow, complexity compounds across governance, operating structure, leadership alignment, and execution discipline. At the same time, expectations from clients, investors and stakeholders continue to rise at an accelerated rate.

Brown Operating Partners works directly alongside founders, CEOs, boards, and investors as an extension of leadership teams to translate enterprise vision into clear strategy and sustained execution. The firm focuses on helping organizations navigate consequential moments where growth, capital, and complexity intersect.

Who We Serve

Registered Investment Advisors



Founder-led to enterprise level national firms at inflection points of growth, leadership succession planning or expanding service models to specialize capabilities for ultra-high-net-worth clients.

Multi-Family Offices and Professional Services Firms



Regional or national multi-family offices and professional service firms at the intersection of growth, scale and expansion of services.

Strategic Investors



Minority or majority investors in RIAs seeking strategic or expert support in periods of sourcing, diligence, integration, leadership structure and strategic growth planning.

What We Do

Enterprise Strategy & Operating Architecture

Working alongside leadership to clarify direction and strengthen institutional structure.

- Governance and decision-rights alignment
- Organizational design and leadership structure
- UHNW service architecture and platform strategy
- Founder-to-institution transition

Growth & Platform Development

Building the infrastructure and resources for growth.

- Organic and inorganic growth strategies
- Enterprise positioning and differentiation
- Advisor enablement and productivity
- Strategic partner ecosystem and referral strategies

Execution & Enterprise Alignment

Ensuring strategy translates into measurable enterprise progress.

- Enterprise initiative prioritization and sequencing
- KPI clarity and operating cadence
- Cross functional leadership and accountability
- Alignment across specialist partners and advisors

What To Expect

Brown Operating Partners serves as a strategic extension of leaders and stakeholders during *consequential moments* of the firm's evolution.

Frame

Clarify "the moment" and what matters

Align

Establish shared direction and priorities

Decide

Commit to the plan and accountability

Advance

Drive priorities toward meaningful outcomes

Aligning the Vision, Strategy and Execution at each phase so strategic priorities convert to sustained, long-term success.



About Brown Operating Partners

Brown Operating Partners was founded by Eddie Brown with more than 25 years of building and leading wealth management platforms to serve the unique needs of ultra-high-net-worth families and family offices. He has led enterprise growth, strategy, and platform development across public firms, founder-led organizations, and private capital-backed advisory businesses. This experience provides Brown Operating Partners with a rare 360-degree view of the industry, from family principals and advisors to executive leadership and strategic investors. The firm works alongside family members, principals and family office executives to provide perspective, structure, and disciplined coordination fully aligned with the culture, values and autonomy of the family.

Our Approach

Engagements are intentionally selective and highly customized grounded in three guiding principles.

Deliberate



Selective engagements beginning with deep discovery, alignment on scope and a clear structured process with timeline.

Discreet



Collaborating with family principals and leadership teams respecting full privacy and security through highly confidential engagements.

Dedicated



Immersion as an operating partner with clients focused on achieving all objectives together.