



Operator-Led *Advisory Services* for Family Offices and Wealth Management Firms

Our Why

The wealth management and family office industry are experiencing a period of profound transition, growth and evolution. Wealth management firms are seeking to expand services to meet the growing expectations and attract families with significant wealth. Firms are growing through mergers and acquisitions fueled by private equity. Family offices are navigating generational wealth transfer, succession of family office leadership, and increasing complexity across investments, operating businesses, and advisor ecosystems.

As complexity increases, leadership teams and family principals face the same underlying challenge: maintaining clarity of direction, alignment across stakeholders, and disciplined execution. Brown Operating Partners is an operator-led advisory firm. Drawing on more than 25 years of experience across the wealth and family office ecosystem, the firm partners with senior leaders, investors and family principals to bring clarity in complex environments converting strategic ambition into measurable progress and results.

The Operating Partner Difference

Traditional consulting provides analysis and recommendations.

Fractional executives provide leadership capacity.

An operating partner integrates the best of both ensuring alignment, accountability and results.

The Bridge. From Vision to Results.

Brown Operating Partners was established to provide strategic advisory services to family offices and wealth management firms navigating consequential moments.

The foundation of Brown Operating Partners is built on decades of operating experience, leadership and trusted relationships, the firm serves as the bridge between vision and results.

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.