



STEVE SPRINGSTEAD

Execution Edge Coaching & Consulting

[EXECUTIONEDGE.ORG](https://executionedge.org)

Focus. Discipline. Action.

With 33 years of experience as a Wealth Advisor, Portfolio Manager, and Assistant Branch Manager at a large bank-owned investment firm, Steve Springstead brings a rare “both sides of the desk” perspective. Having led his own team to perennial President’s and Chairman’s Council qualifications while simultaneously coaching advisors and leading practice management sessions, Steve understands the realities of building and scaling a top-tier practice.

Wealth management is rarely held back by a lack of vision—it is constrained by the friction of execution. Execution Edge partners with advisors, team leaders, and branch managers to implement execution-focused accountability systems, future-proof practices, and transition successful advisors into effective team leaders, driving meaningful, long-lasting change.

Core Advisory Engagements

Practice Engine Coaching

Investment: \$3,300 (12 hours spread over up to 1 year)

Establishing a dependable operational foundation using structured systems, repeatable processes, and efficiency tools to drive sustainable growth.

- **Ideal For:** Fast-growing younger advisors building their base, or established advisors seeking to overcome a plateau and reignite growth.

Strategic Team Consulting

Investment: \$5,000 (12 hours + on-demand services)

High-level, future-proof strategies designed to take high-performing teams to the next level, while developing leadership capabilities and modernizing service offerings.

- **Ideal For:** High-performing advisory teams ready to scale and grow.
- **Key Modules:** Next-Gen Service Playbooks, "Family Office Lite" service design, integrating AI while leaning into the *human* side of advice, team culture, compensation, and succession planning.

Business Planning Intensive

Investment: \$1,000

A dedicated half-day alignment session to clarify team goals, identify operational bottlenecks, and formulate actionable 12-month priorities.

- **Includes:** 4 hours of live facilitation (morning or afternoon) with the entire advisory team, followed by structured implementation recommendations.

Enterprise & Fractional Practice Management

Tailored practice management engagements built for large branch networks within major firms, or boutique wealth management firms seeking dedicated practice leadership. Customized entirely to your branch and firm's strategic objectives.

- **Cohort Development:** Group coaching programs tailored for rising talent and next-generation advisors.
- **Peer Learning & Workshops:** Facilitated group practice management sessions and branch-wide strategy sessions for branches or small firms.
- **Ad-Hoc Advisory:** On-demand coaching for boutique firms with no internal coaching capabilities to help branch managers resolve specific team bottlenecks proactively.

Speaking, Keynotes & Workshop Facilitation

Engaging, results-oriented presentations tailored for industry association events, mutual fund conferences, regional roadshows, branch meetings, and top-performing council summits.

AI & The Human Edge

Balancing AI tools with high-touch, empathetic human advice.

Family-Centered Growth

Why focusing on the broader family unit drives long-term client retention.

The Great Wealth Transfer

Practical frameworks to minimize asset attrition and engage rising heirs.

Succession Planning Realities

Structuring sustainable team handoffs and robust continuity plans.

From Advisor to Team Leader

Navigating the transition from individual producer to team leader.

Modern Practice Branding

Updating your advisory value proposition for a rapidly changing industry.

Industry Thought Leadership

Writer & Author: *What's Next, Gen – Fixing the Wealth Gap One Family at a Time*

Published Perspectives: Regular long-form articles and industry analysis on LinkedIn, tackling the core issues that impact wealth management today.

Recent Publication: "The Elephant in the Wealth Management Room – Advisor Overwhelm and Burnout"

Ready to achieve meaningful, long-lasting change? Let's connect.

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