StepStone Private Wealth Adds Marketing, RIA Relationship Executives

October 17, 2024

NEW YORK, Oct. 17, 2024 (GLOBE NEWSWIRE) -- StepStone Private Wealth (“SPW”) today announced that it has hired two senior-level executives in marketing and RIA relationship management to support its continued growth. Berta Aldrich has been named Managing Director and Global Head of Private Wealth Marketing and David Robbins has been named Director of Enterprise RIA Relationship Management. Both joined SPW earlier this month.

“We are excited to welcome these two accomplished executives with exceptional track records of success in growing asset management franchises the right way,” said Bob Long, Partner and CEO of StepStone Private Wealth. “With our platform now managing over $5 billion for individual investors and small institutions, Berta and David will play critical roles in our continued expansion and global brand recognition.”

In her newly created position, Ms. Aldrich will be responsible for marketing and brand strategy of the SPW platform globally. In 2023, she was named to the InvestmentNews Hot List, which recognizes the industry’s top financial professionals. Ms. Aldrich brings to SPW over three decades of experience with leading financial services companies. Prior to joining SPW, she was President of an executive training and coaching consultancy, working with Fortune 100 executives in multiple industries across the globe. Prior to that, she served in C-suite and senior marketing executive roles at Vanguard, Principal, FS Investments and Private Advisor Group. Ms. Aldrich holds an MBA from St. Joseph’s University and earned her bachelor’s degree from Iowa State University.

Mr. Robbins will lead the education, onboarding and servicing of the U.S.’s largest RIA firms. Prior to joining SPW, he was a Senior Vice President and National Sales Manager at Neuberger Berman covering RIAs and Multi-Family Offices. While there, he was responsible for distribution of the firm’s private equity, private credit, SMA, ETF, directing indexing, and mutual fund products, facilitating hundreds of new accounts and billions of dollars in new asset flows. Prior to Neuberger he held distribution roles of increasing responsibility at Lord Abbett & Co and began his career as a wholesaler at John Hancock. He holds a bachelor’s degree from Babson College.

“At SPW, we have built a reputation for delivering private solutions designed with the end investor in mind,” said Neil Menard, Partner and President of Distribution, StepStone Private Wealth. “Adding Berta and David to the team will expand our efforts to share this message with new advisors and their clients while providing exceptional service.”

About StepStone

StepStone Group Inc. (Nasdaq: STEP) is a global private markets investment firm focused on providing customized investment solutions and advisory and data services to its clients. As of June 30, 2024, StepStone was responsible for approximately $701 billion of total capital, including $170 billion of assets under management. StepStone’s clients include some of the world’s largest public and private defined benefit and defined contribution pension funds, sovereign wealth funds and insurance companies, as well as prominent endowments, foundations, family offices and private wealth clients, which include high-net-worth and mass affluent individuals. StepStone partners with its clients to develop and build private markets portfolios designed to meet their specific objectives across the private equity, infrastructure, private debt and real estate asset classes.

Contacts

Shareholder Relations:

Seth Weiss

shareholders@stepstonegroup.com

+1 (212) 351-6106

Media:

Brian Ruby / Chris Gillick / Matt Lettiero, ICR

StepStonePR@icrinc.com

+1 (203) 682-8268