

WHITWELL & CO.
Wealth Management | Invest. With Purpose.

PRESS AND SPEAKER KIT

Stefan Whitwell, CFA, CIPM

Founder, CEO, and Chief Investment Officer, Whitwell & Co.



Stefan Whitwell, CFA, CIPM, is a global deal-maker turned purpose-driven wealth strategist: ex-Goldman Sachs, ex-Credit Suisse, Wharton-trained, and now founder and CEO of Whitwell & Co., an SEC-registered fiduciary in the Austin area serving founders and families. He lost everything in 2009 and rebuilt. He holds a black belt in Hakko-Ryu Jujutsu and a brown belt in Brazilian Jiu-Jitsu, and he is a violinist of more than 40 years, a former Zen temple apprentice in Japan, a builder of AI and automation inside a working advisory firm, and a father of four. He gives audiences plain-English clarity on money questions they thought were too complex to ask.

More than a finance and tax expert

PERSEVERANCE

He lost everything in 2009, owned it, and rebuilt

In the middle of the Great Recession, a bank declined to renew one loan on Stefan's real estate portfolio. The default spread to every other loan, and he lost everything, with three children at home. He owns his part plainly: he was over-concentrated and had no asset protection or tax plan. A mentor told him, "You know, you walk through fire. You should advise others." He rebuilt from there, starting a wealth management career that led him to found Whitwell & Co. in 2017.

"The hardest part was in bankruptcy court; it was telling my kids we can't afford summer camp."

DISCIPLINE

Zen, Jujutsu, and 40 years of violin

Stefan spent a year in Japan studying martial arts and apprenticing with Zen Master Sanshu at the Saijo-ji temple. He holds a black belt in Hakko-Ryu Jujutsu and a brown belt in Brazilian Jiu-Jitsu, and has played the violin for more than 40 years. He brings the same patience to markets, to clients, and to the long work of building a firm.

"So show up, even when it sucks. That principle will help you build wealth, will help you get better on the mat, will help you build teams. No flash, just reps."

AI AND AUTOMATION

He builds with AI inside a regulated firm

Stefan does not only talk about AI. He deploys AI and automation inside a working advisory firm, from an around-the-clock concierge line to research workflows, without losing the human relationship. He is co-author, with Brandon Veldman, CFA, of *If Done Right: The AI Governance Framework for Regulated Financial Firms*.

FATHERHOOD

A father of four, first

Stefan grew up watching his own father, a school teacher, start a self-publishing business to make ends meet, and noticed that it meant his dad was around when he needed him. He runs his firm to follow that tradition: a thriving business, and a family that thrives along the way. Three of his four children are grown; the youngest is at home with him.

"I think my most important job is being dad."

Approved bios

ONE LINE

Stefan Whitwell, CFA, CIPM, is the founder, CEO, and Chief Investment Officer of Whitwell & Co., LLC, an Austin-based, SEC-registered fiduciary serving founders, executives, and families.

SHORT, ABOUT 70 WORDS

Stefan Whitwell, CFA, CIPM, is a global deal-maker turned purpose-driven wealth strategist. He began his career in M&A and capital markets at James D. Wolfensohn, Inc., Goldman Sachs, and Credit Suisse First Boston, working across New York, London, Hong Kong, and Tokyo. Today, as founder, CEO, and Chief Investment Officer of Whitwell & Co., LLC, he helps founders and families convert the complexity of wealth into freedom and legacy.

MEDIUM, ABOUT 140 WORDS

Stefan Whitwell, CFA, CIPM, is the founder, CEO, and Chief Investment Officer of Whitwell & Co., LLC, the SEC-registered investment advisory firm he founded in 2017. He specializes in proactive tax planning, vetted non-traditional investments when appropriate, and family office services, with a particular focus on business owners navigating growth funding, exit preparation, and legacy conversion. Stefan began his career on Wall Street at James D. Wolfensohn, Inc., Goldman Sachs, and Credit Suisse First Boston, with experience spanning New York, London, Hong Kong, and Tokyo. A graduate of the Wharton School, he served five years on CFA Institute's global Educational Advisory Committee. He lives in Austin, Texas, is a father of four, holds a black belt in Hakko-Ryu Jujutsu and a brown belt in Brazilian Jiu-Jitsu, and has played the violin for more than 40 years.

Host-ready intros

PODCAST INTRO, 10 TO 15 SECONDS

"Our next guest helps purpose-driven founders turn the complexity of wealth into freedom and legacy. He's an ex-Goldman, ex-Credit Suisse M&A banker, now running Whitwell & Co. in Austin, an SEC-registered fiduciary serving business owners and families. He's also a Hakko-Ryu Jujutsu black belt, a Brazilian Jiu-Jitsu brown belt, a 40-year violinist, and a dad of four. Please welcome Stefan Whitwell."

STAGE INTRO, ABOUT 30 SECONDS

"Most people think wealth buys freedom. But at a certain level, wealth can also buy complexity. Our next speaker helps families who are doing well on paper but feel the hidden tax of success: too many accounts, too many decisions, too many advisors, and not enough certainty that it's all coordinated. Stefan Whitwell, founder of Whitwell & Co., is an SEC-registered fiduciary who helps business owners simplify their financial life, protect what matters most, and make sure their money supports a life of meaning, not just a lifestyle. He lost everything in 2009 and rebuilt, holds a black belt in Hakko-Ryu Jujutsu and a brown belt in Brazilian Jiu-Jitsu, plays the violin, speaks Japanese, and is the proud dad of four. Please welcome Stefan Whitwell."

Conversations he can carry

THE HUMAN STORY

Lost It All, Owned It, Rebuilt

What it is like to lose it all in 2009 with three children at home, what he got wrong, how a mentor's one sentence turned a collapse into a calling, and how he rebuilt.

Zen, Jujutsu, and the Long Game

What a year in a Japanese Zen temple and decades on the mat teach about pressure, patience, and showing up when it is hard.

AI Inside a Wealth Firm

How a boutique advisory firm actually deploys AI and automation, from an around-the-clock concierge line to research workflows, without losing the human relationship, and how a regulated firm governs it.

The Most Important Job: Being Dad

Building a demanding business around four children instead of the other way around, and what his own father's example taught him about being present.

MONEY, PLAINLY

The Success Tax

The hidden costs of getting wealthy: unnecessary payments to the IRS, compounding complexity, and missed opportunities. Why most financial pain shows up late.

Exit-Ready: The 24 Months Before a Sale

What founders should do, in order, before selling a business: entity and tax design, the advisory team, valuation drivers, and the personal plan for life after the sale.

Designed Optionality, Not Retirement Dates

Why planning around a retirement date is outdated. Optionality is a strategy; retirement is just one outcome.

The Modern Family Office

What a family office actually does, and how technology lets more families access that kind of coordination without the institutional overhead.

Beyond Plain Vanilla Index Funds

Where vetted non-traditional investments can fit in a family's plan when appropriate, where they do not, and the due-diligence discipline that separates access from adventure.

Why Banks Decline Successful Founders

How conventional underwriting misreads founder-led companies, and what owners can do about it.

Wealth, Health, and Purpose

The three-dimensional balance sheet: why money becomes theoretical when health fails, and hollow when purpose is missing.

Lessons from Wall Street and Japan

What a decade across 10 countries, Goldman Sachs derivatives desks, and Japanese discipline teach about risk, patience, and stewardship.

Questions that work

THE HUMAN STORY

1. In 2009 you lost everything. What happened, what part do you own, and how did you rebuild?
2. You say you own your role in that loss. What would you tell a founder who is over-concentrated today?
3. What did a year apprenticing in a Zen temple in Japan teach you that Wall Street did not?
4. What does Jiu-Jitsu teach about pressure that applies to money and to markets?
5. You co-wrote a book on governing AI inside regulated firms. Where does AI help a family, and where does it not?
6. You call being a dad your most important job. How does that change the way you run a firm?

MONEY, PLAINLY

1. You say most financial pain shows up late in wealth. What do you mean by that?
2. What is the success tax, and how do successful families end up paying it without realizing?

3. You often say there are really only five things you can do with money. Walk us through them.
4. What does a family office actually do, and what makes a modern family office different?
5. When do non-traditional investments make sense for a family, and just as important, when do they not?
6. What should a founder start doing 24 months before selling their business?
7. Why do banks so often decline founders who are having their best year ever?
8. You define wealth in three dimensions: financial, health, and purpose. Why put health on the balance sheet?
9. What is designed optionality, and how is it different from retirement planning?
10. You worked at Goldman Sachs and Credit Suisse across four continents. What did Wall Street teach you that you still use with families today?
11. You call listening an undervalued skill in this industry. Why does it matter more than forecasting?
12. Your podcast is called The Meaning of Money. After 30 years in finance, what is money actually for?

Fast facts

Source	Stefan Whitwell, CFA, CIPM, CEO and Chief Investment Officer, Whitwell & Co., LLC
Firm	Fee-only, SEC-registered investment adviser (CRD #331958), founded 2017; fiduciary standard
Base	Austin (Bee Cave), Texas, Central Time; broadcast-quality remote setup
Reach	Serves clients across the country, adding state registrations and notice filings as relationships grow
Clients	Business owners, exit-focused founders, senior executives, and women navigating life changes
Minimums	Firm minimum of USD \$2 million in investable assets; USD \$5 million to work directly with Stefan
He hosts	The Meaning of Money, a conversation series for founders and families on what wealth is really for
Restrictions	No individual securities recommendations; no client-specific matters

CREDENTIALS

- CFA® charterholder and CIPM® certificant, CFA Institute.
- Bachelor of science in economics, concentration in finance, the Wharton School of the University of Pennsylvania.
- Five years of service on CFA Institute's global Educational Advisory Committee.
- Career: James D. Wolfensohn, Inc.; Goldman Sachs (equity derivatives); Credit Suisse First Boston (Director, Head of Asia-Pacific, CSFBNext); founder of Whitwell & Co.
- Lived or worked in 10 countries across a decade abroad; proficient in Japanese.

PERSONAL

- Father of four: three grown, one at home with him. Lives in Austin, Texas.
- Black belt in Hakko-Ryu Jujutsu and brown belt in Brazilian Jiu-Jitsu.
- Violinist for more than 40 years.
- Spent a year in Japan studying martial arts and apprenticing with Zen Master Sanshu at the Saijo-ji temple.
- Graduate of the BOSS outdoor survival program.

Featured or published in Business Insider, Yahoo Finance, Nikkei Asia, GQ, Vogue, Prime Women, and the Austin American-Statesman. Guest lectures at the Wharton School, the University of Pennsylvania, Temple University, the University of Texas at Austin, and Hitotsubashi University in Tokyo.

Logistics

Location	Austin, Texas (Central Time)
Remote setup	Broadcast-quality camera, microphone, and lighting; wired connection
In person	Available in Austin; travels for keynotes and select events
Formats	Podcast, live stage, panels, webinars, workshops, moderated Q&A, written commentary
Lead time	Most bookings within two to three weeks; same-week possible
Approvals	No script control requested; a disclosure line for show notes is provided below

Wording for your show notes

Please use this wording and these links in your show notes, exactly as written, so every listing describes Stefan the same way.

Stefan Whitwell, CFA, CIPM, is founder and CIO of Whitwell & Co.
(<https://whitwelladvisors.com/team/stefan-whitwell>). Author of RIGGED
(<https://marrieduediligence.com/book>). Host of The Meaning of Money and RIGGED, The Marriage Due Diligence Podcast.

Booking and contact

media@whitwelladvisors.com | (512) 766-7775 | whitwelladvisors.com/team/in-the-media/press-kit/

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