



Cover Story

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## FOUNDATIONS & PURPOSE

### **1. With nearly four decades in financial services, what first drew you to wealth management—and what has sustained your passion over time?**

I was drawn early on to the combination of fast-moving capital markets and ultra-high-net-worth wealth management. I found the markets intellectually compelling, but I was equally struck by how opaque they were for individual investors, especially women. At that time, access, language, and decision-making power were tightly held. For all intents and purposes, the financial markets were a man's world. What has stayed with me over time is the opportunity to change that. When women truly understand how markets work and how their capital can work for them, it changes the conversation—from being talked at to being fully engaged. That shift is powerful. Markets evolve, structures change, but the need for transparency, education, and trust has never gone away. That's what continues to motivate me.

### **2. What early lessons from the beginning of your career still shape how you advise clients today?**

Early in my career, I learned the value of helping clients understand their finances and empowering their knowledge. To this day, helping to connect clients with their money and how it works for them results in greater satisfaction and success. It's all about our clients and their families.

Another lesson is the importance of focusing on each individual client and her story. Wealth planning is deeply personal. As we develop an investment policy statement or long-term strategy, we start with what matters to her. For example, if a client is expanding her company into new regions and cares

deeply about local philanthropy, that becomes part of the planning conversation, not an afterthought. Strategy should reflect the life being lived.

Finally, I learned to take the long view. I've worked through many different market environments and alongside families across generations. Wealth is often built through private businesses and then evolves into a mix of public and private investments. Staying focused on the long term, through market cycles, transitions, and change—is essential. That perspective continues to guide how I advise clients today.

### **3. Having navigated multiple market cycles, how has long-term experience changed the way you view risk, resilience, and opportunity?**

More than 35 years in the industry have demonstrated the importance of developing solid financial analysis and seeking strong company leadership. Being contrary and patient: buy straw hats in the winter and sell in the summer. Time in the markets and not timing the markets.

## BUILDING AKD WEALTH PARTNERS

### **4. In 2023, you co-founded AKD Wealth Partners. What inspired you to create a new Practice at this stage of your career?**

At this stage of my career, I wanted to build something intentionally—something nimbler, more responsive, and more aligned with how our clients actually live and make decisions. I wanted to remove unnecessary layers of management so we could be more proactive and truly present for our clients.





Founding AKD Wealth Partners gave us the ability to design everything from the ground up. From our office environment, which reflects transparency, light, and openness—to the way we communicate and collaborate, it all matters. Most importantly, I was able to build my dream team. People who are thoughtful, deeply experienced, and client centered. Together, we're focused on delivering a top-notch wealth management experience that feels personal, clear, and intentional.

**5. What core philosophy guided the founding of AKD Wealth Partners, and how does it differ from traditional wealth management models?**

AKD Wealth Partners was founded on the belief that wealth management should be transparent, thoughtful, and centered on the

client rather than the institution. When we started the team, it was important to build a wealth advisory practice that reflects how we believe clients should be served, clearly, proactively, and without unnecessary layers.

With a nimble structure and an experienced team, we're able to adapt quickly, take a long-term view, and tailor advice to the realities of our clients' lives. The result is a wealth advisory experience that feels personal, simplified, and empowering—while still grounded in rigorous analysis and disciplined strategy.

**6. How does your team approach multi-generational wealth planning in a way that feels personal, simplified, and empowering?**

We're very intentional about making wealth planning feel human. Having a multi-generational team allows us to naturally connect with all generations within a family, which leads to more open and personal conversations. We work to be mentors and strong stewards to our clients. It's important that we share the knowledge of what that means to the next gens we are working with. It often comes down to having those individual conversations, not just lectures on asset allocation.

**STRATEGY, EXPERTISE & CLIENT EXPERIENCE**

**7. As a Chartered Financial Analyst and Senior PIM Portfolio Manager, how do you balance technical rigor with personalized client care?**

It often depends on the day and the roster of meetings scheduled; the day and what may have spooked the markets; changes in global economics, and the yield curve. This is not a typical 9-5 job, and the technical rigor around research and analysis is ongoing.

We are a kick-ass team. As a team, we have an Investment Committee and hold regular meetings. As a team, we have regular client outreach and scheduled review meetings. As a team, we are responsive and proactive with client requests.

**8. You often describe wealth planning as crafting a financial narrative. What does that mean, and why is it so powerful?**

The financial narrative is the story about a client, her family, her business, and her money. It personalizes where each person is in their financial journey, their story, what is important, and how they want to be communicated with. It weaves in real life with what's most important, to best develop a strategy and path showing what matters most for them. The narrative could be in helping their grandchildren understand their shared family values and build that next gen of independent wealth. The narrative could be in helping someone see they can live a certain lifestyle, not outlive their resources, and still contribute or invest in areas that are important to them, such as providing seed capital to young women-run businesses or impact investments. We can best help by asking questions and listening, so we truly understand her narrative.

**9. How does discretionary portfolio management help you protect clients in an increasingly complex financial landscape?**

People are emotionally inclined through cognition to not always make investment decisions that can help build wealth over the long term. Often, immense volatility scares people and can cause them to panic or act against their better judgment. A simple example, if the market drops quickly, that may not be the day you want to sell. Often, when looking back a year from that point, there is more clarity, and holding on to investments makes great sense. We try to help even out the air bumps with dialogue and diversification.

**10. What is the most common misconception clients have about wealth preservation and long-term planning?**

Many clients assume that wealth preservation is mostly about picking the right investments at a moment in time. In reality, long-term success is more mundane and disciplined: consistently saving and investing through all business and economic cycles, avoiding overspending that forces large withdrawals from the portfolio, and anchoring everything to a wealth plan. We often begin relationships by building that plan together and revisiting it over time.

Another common misconception is that wealth planning is all about quick returns. Our work is about so much more: living out values, moving money to be tax efficient, accomplishing goals. Many of our client are charitably inclined and prioritize giving. Our partnership empowers greater awareness of donor advised funds (DAFS), tax efficiency, seed funding to women-run businesses needing startup capital, and other options for

philanthropy. Working with a financial advisor who can help you stay on course through all the ups and downs of life is what really drives long-term preservation and growth of wealth.

## **SIMPLIFYING COMPLEXITY & BUILDING TRUST**

### **11. How do you help clients cut through financial complexity and gain clarity and confidence in their decisions?**

For some clients, clarity comes from talking things through in conversation; for others, it's seeing charts and figures, or a brief executive summary.

Ultimately, we get to know our clients and their learning styles so we can tailor communication to their preferences. Warren Buffett said that if an investment can't be explained in a couple of clear sentences, it isn't worth the risk. This is a guiding principle in how I work with clients. My goal is for clients to clearly understand the basics of why we've chosen a particular investment strategy for them, and then we can explore the finer points at whatever level of detail feels most comfortable.

### **12. How do you tailor strategies for clients at different life stages—from accumulation to transition to legacy?**

We look at many different elements, not just age. Risk tolerance, liquidity needs, tax situations on respective accounts, and desire for annual philanthropic donations. For some clients, as an example, we have been discussing partial conversions of their IRAs to ROTH IRAs, given they want to leave money to grandchildren and do not want them to pay taxes on inheritance. All of this must be personalized and is client & family-nuanced.

### **13. What role does trust play in your long-term client relationships, and how do you earn it over decades?**

Trust is everything. It is the basis of why someone wants to work with you, why they stay over the decades, and why they introduce you to family, friends, and business partners. Trust is about transparency; it's how you run your business, it's articulating your fee structures, it's honesty, and it's always putting your clients' interests ahead of your own.

## **WOMEN, LEADERSHIP & INDUSTRY IMPACT**

### **14. As one of the most empowering women in wealth management, how do you see women reshaping the industry today?**

We are embarking on what many are calling “the great wealth transfer” as money passes to wives and spouses—the thought being that when this money lands in the hands of women, they will demand a reshaping. They come to the table expecting the conversation to be about them, their wealth, and how they can use it to shape the world differently. This shift is best captured by a question posed by Andrea Turner Moffitt: “Are you deploying resources and investing to maintain the status quo, or to catalyze scalable impact + returns you want to see in the world?”

I see women answering that question by moving beyond traditional models and embracing ESG and impact investing. They are seeking intentionality, ensuring their capital is supporting diverse leadership and driving intentional change. Younger women are particularly fierce and courageous in this regard. Many came of age when the “Fearless Girl”



was first placed in front of the Wall Street Bull in 2017. It encouraged girls, moms, and women to think differently, from developing girl-led finance clubs to rethinking how seed capital could be deployed to invest in women-led ventures. When women today don't see the traditional capital markets working for them, they make the changes and develop what does. It could be as simple as changing to a wealth manager who is listening to them and their interests.

**15. What leadership qualities do you bring to executive decision-making that you believe are especially valuable in finance?**

As President of AKD Wealth Partners, I am responsible for building and managing a team that is empowered to go above and beyond for our clients, to learn and grow in their areas of passion, and nurture their development and excitement to show up every day. For that, I try to bring empathy, humility, and patience, but also encouragement for each team member to bring their A game each and every day. As the leader, I have had to develop many processes and pillars to our practice to focus not just on



my team, but to also run like a Swiss watch for above and beyond client care. This means a seamless onboarding experience for new clients, a powerful process for our investment strategy and portfolio management, and a presence in the community to give back. It's a lot of juggling and prioritizing, while not dropping any of the balls.

**16. What advice would you give women aspiring to senior leadership roles in wealth management?**

Do it! Put yourself in the ring. If you can't achieve what you want in a leadership role where you are, go and create it, build it yourself. To quote Patricia Lizarraga, CIO - WCEO ETF, "Companies run by women historically and statistically are more profitable and often more successful than those run by men."

**RECOGNITION, PURPOSE & LEGACY**

**17. You've been named a Forbes Best-In-State Wealth Advisor from 2019 to 2025. What does this recognition represent to you?**

It has been a great honor to be recognized for my work in this way. I must always thank both my clients and team for helping to achieve this. To me, it represents an ongoing commitment to best practices, doing what is right for a client or team member, and operating always with integrity.

**Disclosure:**

*\*2025 Forbes Best-In-State Wealth Advisors: Awarded April 2025; Data compiled by SHOOK Research LLC based on the time period from 6/30/23 - 6/30/24 (Source: Forbes.com). 2024 Forbes Best-In-State Wealth Advisors: Awarded April 2024; Data compiled by SHOOK Research LLC based on the time period from 6/30/22 - 6/30/23 (Source: Forbes.com). 2023 Forbes Best-In-State Wealth Advisors: Awarded April 2023; Data compiled by SHOOK Research LLC Based on the time Period from 6/30/21 - 6/30/22 (Source: Forbes.com). 2022 Forbes Best-In-State Wealth Advisors: Awarded April 2022; Data compiled by SHOOK Research LLC Based on the time Period from 6/30/20 - 6/30/21 (Source: Forbes.com). 2021 Forbes Best-In-State Wealth Advisors: Awarded February 2021; Data compiled by SHOOK Research LLC Based on the time Period from 6/30/19 - 6/30/20 (Source: Forbes.com). 2020 Forbes Best-In-State Wealth Advisors: Awarded January 2020; Data compiled by SHOOK Research*

LLC Based on the time Period from 6/30/18 – 6/30/19 (Source: Forbes.com). 2019 Forbes Best-In-State Wealth Advisors: Awarded February 2019; Data compiled by SHOOK Research LLC Based on the time Period from 6/30/17 – 6/30/18 (Source: Forbes.com). The Forbes Best-in-State Wealth Advisors rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

**18. Beyond metrics and awards, how do you personally define success in your work?**

There is certainly a happiness quota. I love what I do. I have a fabulous team that shows up every day to help our clients. We all work hard, champion each other on, and try to have some fun together in between everything else that happens. When clients call or write to say thank you and share the differences we have made, or how we have helped them or their families achieve something—even clarity—I feel successful, that we have helped in a good way.

**19. How do your passions outside of finance—advocacy, travel, family—influence your approach to meaningful wealth?**

For me, meaningful wealth is about being able to pursue a life well lived, being able to broaden the reach of how to help others live, build, and grow—it's moments and time with family that you simply don't get a second chance for. Travel has been a way of truly seeing the world and people, understanding different societies and cultures, and

bringing back a greater understanding of the global economy and its nuances. Mentorship to both my two grown sons, nephew, and numerous next gens is very important to me to help people grow, question, and bring change in ways they may not have thought possible.

**20. Looking ahead to 2026 and beyond, what legacy do you hope to leave through your clients, your firm, and the future of wealth management?**

My goal is to make a positive impact on the lives I touch clients, colleagues, family, and community. If, over time, the work we do together helps people feel more confident about their financial lives, more generous with their resources, and more intentional about the kind of world they are shaping, that would be a legacy I would be very grateful for.

**Disclosures:**

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