

Holistic Wealth Management

An Interview with Brittany Boals Moeller, Region Head, Southeast Private Wealth Management, Goldman Sachs

EDITORS' NOTE *Brittany Boals Moeller is the Southeast region head of Private Wealth Management for Goldman Sachs. Prior to her current role, she advised select wealthy families, foundations, and institutions in Atlanta and across the Southeast. Earlier, Moeller served as Chief of Staff to the Chief Executive Officer and the Chief Operating Officer of the Private Wealth Management business. She joined the firm in 2007 as an analyst and was named managing director in 2019. Moeller serves on the Board of Directors of the Alliance Theatre and the Metro Atlanta Chamber Innovation & Entrepreneurship Advisory Board. Additionally, she is Vice President of Strategic Planning and a member of the Board of Directors of the Atlanta Association for Corporate Growth and the Board of Directors for the Atlanta BeltLine Partnership, supporting one of the largest urban redevelopment and mobility projects currently underway in the United States. She also serves as President of the Board of Directors of the Multi-Agency Alliance for Children. Moeller earned a BS in finance and marketing from the Stern School of Business at New York University.*



Brittany Boals Moeller

FIRM BRIEF *Goldman Sachs Private Wealth Management (privatewealth.goldmansachs.com) specializes in curating a comprehensive wealth management experience, customized for ultra-high net worth individuals and families, as well as select institutions, including foundations and endowments. Goldman Sachs is a leading global financial institution that delivers a broad range of financial services to a large and diversified client base that includes corporations, financial institutions, governments and individuals. Founded in 1869, the firm is headquartered in New York and maintains offices in all major financial centers around the world.*

Who are Goldman Sachs Private Wealth Management's clients and how does Goldman Sachs' culture and values help you serve them?

At Goldman Sachs Private Wealth Management, we work with entrepreneurs, business owners, executives and family offices to create simplicity and serve as holistic stewards of their wealth. Goldman Sachs' culture of excellence, commitment to client service, and deep investing expertise are at the center of every client

relationship. We provide each client with a highly curated experience so they can grow and use their wealth in ways that are meaningful to them.

What are some interesting trends and themes you have seen emerging in how the next generation approaches wealth management?

The needs and preferences of our clients are continually changing, and it's imperative that we meet them where they are. Our clients want more from their wealth advisor as we've recognized the shift from traditional investment manage-

ment to holistic wealth management. They desire non-investment family office services in addition to unique investment opportunities. They are digitally forward and value simplicity and ease, as well as access and a network of like-minded individuals. Our clients are diverse in their experiences, backgrounds, and upbringing, and we are continually growing and learning from their unique perspectives.

Does your clients' source of wealth make a difference in how you work with them?

Many of our clients are founders or executives who have created their own wealth, and others are stewards of their family wealth who continually build upon the family's legacy. Regardless of our clients' source of wealth, each relationship is completely customized and unique. We work with each family member to understand their story, and then we create a plan to strategically meet their long-term vision. Our private wealth management teams are uniquely positioned to develop relationships with all family members to support them through all life stages. We even have investing fundamentals courses that begin at age 15.

You're also deeply involved in Goldman Sachs Private Wealth Management's initiative to help women maximize their impact. Will you provide an overview of this initiative?

In the Lead is our unique community and platform of resources designed to help women maximize the impact of their wealth, philanthropy, and legacy. Through In the Lead, we convene remarkable women across the U.S., Europe and Asia around inspiring content and unique access to thought leaders. Our community includes visionaries, entrepreneurs, philanthropists, and industry leaders who are focused on what's moving the world forward, including topics such as health and wellness, AI, generational wealth transfer, and philanthropy.

You are involved in a number of organizations in the Atlanta community. What has made community engagement so important to you?

Being involved in the Atlanta community has always been very important to me and my family. There are few things more rewarding than spending time and resources on a cause that directly helps the people around us. One of my passions is helping children. In Atlanta, we are incredibly fortunate to have Children's Healthcare of Atlanta, one of the most impactful pediatric hospitals in the world. I serve on the investment committee and have the opportunity to share our Goldman Sachs insights in an effort to help further the long-term impact of this great hospital. I am also involved with the Multi-Agency Alliance for Children, which is a remarkable organization focused on youth in the foster care system. I would encourage everyone who is able to become involved in their community. I have learned so much from these experiences.

You joined Goldman Sachs in 2007 and just made Partner this year. What has made the experience so special for you?

Being part of Goldman Sachs over the past 17 years has been an extremely rewarding experience. I've had the chance to work in several different roles, each of which was an opportunity to gather new perspectives from the people and clients that we work with. Our clients are what have made this experience so special to me and will continue to be my favorite part of each day. Needless to say, the individuals that I work with here at Goldman Sachs continue to remind me why I come to work each day. I'm constantly challenged and learning from those around me.

What advice do you offer to young people beginning their careers?

It can feel like there is so much pressure on young professionals today. Even before you're out of college, it can seem like you're expected to know what the next six chapters of life will look like. My advice is to slow that down and instead focus on what is right in front of you. Sometimes, when people are looking a few steps ahead, they miss out on tremendous learning and growth opportunities. The young people who have stayed present and committed, in my experience, have gone on to have the most successful futures. I would encourage young professionals to work hard and do something that you enjoy doing each day. Surround yourself with good people who continue to challenge you to be the best version of yourself. Have clear priorities between work and family, and don't lose sight of those. ●