

Sovereign Wealth Advisors LLC Adds Elite Industry Veteran to Advisory Team

Top-producing financial advisor brings nearly 40 years of experience and a track record of exceptional client results.

HOUSTON, TX, UNITED STATES, July 10, 2025 /EINPresswire.com/ -- Top-producing financial advisor brings nearly 40 years of experience and a track record of exceptional client results.

Sovereign Wealth Advisors, LLC proudly announces the addition of Gene Theobald as Senior Vice President and Wealth Advisor. A top-performing financial professional with nearly four decades of industry leadership, Gene joins SWA with a reputation for delivering highly sophisticated strategies and uncovering unique investment opportunities for high-net-worth clients.

Throughout his distinguished career, Gene has consistently ranked as a top producer at every firm he's served—setting the standard for excellence at institutions such as Morgan Stanley and Smith Barney. Based in Houston, he brings deep expertise in municipal bonds and tax-efficient investment strategies, along with a longstanding commitment to building trusted, multigenerational client relationships.

"Gene's track record speaks for itself," said Rusty Gebhard, CEO and Founder of Sovereign Wealth Advisors. "He brings a level of experience, performance, and integrity that aligns perfectly with our mission. His arrival significantly enhances our ability to deliver elite, customized wealth strategies to the clients and families we serve."

Gene is known for delivering advanced, high-touch strategies that go beyond traditional financial planning. His ability to navigate complexity, identify differentiated opportunities, and simplify



Senior Vice President and Wealth Advisor, Gene Theobald

decision-making has earned him enduring loyalty from clients who expect more than cookie-cutter advice. With a sharp focus on tax efficiency, risk mitigation, and long-term value creation, Gene brings an elevated level of service and insight to the SWA platform.

“Joining Sovereign Wealth Advisors is a natural fit,” said Theobald. “The firm’s commitment to independence, transparency, and client-focused excellence mirrors the values I’ve upheld throughout my career. I’m excited to contribute to a team that’s raising the bar in wealth management.”

Outside the office, Gene is a devoted family man and a passionate car enthusiast who enjoys collecting and restoring classic vehicles—a lifelong pursuit that reflects his attention to detail and appreciation for craftsmanship.

About Sovereign Wealth Advisors

Sovereign Wealth Advisors, LLC is an independent wealth management firm dedicated to delivering personalized financial guidance to individuals, families, and business owners. With a client-first approach rooted in trust and transparency, the firm provides tailored investment management, retirement planning, and estate planning strategies designed to support long-term financial success.

For more information, visit: www.sovereignwealthadvisors.com

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