

Etico Expands Rapidly with Key Leadership Hires and New Advisor Partnerships Across the U.S.

Advisor-first platform adds compliance and operations talent, welcomes nine independent advisors across key regional markets.

SARATOGA SPRINGS, NY, UNITED STATES, August 5, 2025

/EINPresswire.com/ -- [Etico](#), a fast-growing independent wealth advisory

platform, today announced a wave of new hires and advisor additions that reflect the firm's accelerating national expansion and commitment to [advisor-first service](#).



Etico

“

We continue to invest in people and infrastructure to meet the evolving needs of advisors. Top-tier advisors are seeking partners who offer scalable support without sacrificing independence.”

*Joe Leo, Chief Executive Officer
of Etico*

The firm welcomed three new team members on the operations and compliance side:

- Josh Gilbert, Chief Compliance Officer, brings extensive regulatory leadership to ensure Etico's continued commitment to transparent, advisor-friendly practices.
- Jadyn Dawes, Assistant Vice President of Advisor Solutions, reporting to Beth Holbrook, VP of Institutional Operations, will strengthen transition support for incoming advisors.
- Bejal Pattni, also Assistant Vice President of Advisor

Services under Holbrook, will enhance operational onboarding and service excellence.

In addition to key hires, Etico has onboarded nine [independent financial advisors](#), bringing a combined multi-state presence and decades of client-focused experience:

- Pierre Duchmann, Utica, NY

- David Bossov, Chicago, IL
- Jonathan Hoenig, Chicago, IL
- Ross Bruner, The Hamptons, NY
- Mark Landau, Saratoga Springs, NY
- Benjamin Gerald, Dallas, TX
- Jack Talarico, Utica, NY
- Luis Servellon, Albany, NY
- Jennifer Harvey, Austin, TX



Joe Leo, CEO of Etico Financial

"These new additions aren't just growth milestones—they're a signal that top-tier advisors are seeking values-aligned partners who offer scalable support without sacrificing independence," said Joe Leo, CEO of Etico. "We continue to invest in people and infrastructure to meet the evolving needs of advisors ready to own their future."

The expansion supports Etico's national goal to recruit and support advisors in second- and third-tier markets, backed by a leadership team with deep roots in advisor transitions, operations, and investment strategy.

About Etico

At Etico, we empower independent financial advisors to own their journey and build scalable, thriving practices. Designed by advisors, for advisors, our solutions combine tailored back-office support, cutting-edge technology, and open architecture investment platform to enhance client outcomes, streamline operations, and drive growth.

We specialize in seamless transitions, personalized service, and transparent compensation, enabling advisors to focus on their clients while scaling their business without compromise. With Etico, you own 100% of your book of business, gain access to top-tier custodians, technology and leverage tools and strategies to grow with confidence.

Etico isn't just a partner—it's a platform for your success.

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Etico

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