



CEO Zak Gardezy: Wealthstone Surpasses 100% AUM Growth Milestone in Just 12 Months

Independent RIA achieves rapid expansion by combining fiduciary-led planning, tax-efficient investment strategies, and a client-first boutique approach.

SCOTTSDALE, AZ, UNITED STATES, October 8, 2025 /EINPresswire.com/ -- Wealthstone Private Wealth Management, a Scottsdale-based independent registered investment advisor led by Zak Gardezy, today announced that the firm's assets under management (AUM) have grown by more than 100% over the past 12 months. The milestone reflects Wealthstone's commitment to fiduciary-led advice, personalized financial planning, and tax-efficient investment strategies that resonate with high-net-worth and ultra-high-net-worth clients nationwide. Since its founding, Wealthstone has differentiated itself from traditional Wall Street firms by prioritizing transparency, independence, and comprehensive financial planning. This unique positioning has fueled rapid client growth and an expanding national footprint.

"Our extraordinary growth over the last year comes down to one thing: trust," said Zak Gardezy, CFP®, CEO and Founder of Wealthstone Private Wealth Management. "That trust has been built on four guiding principles. First, we lead every interaction by putting clients' interests ahead of everything else, in line with our fiduciary promise. Second, we pair in-depth financial planning with tailored strategy, for example, helping Silicon Valley executives diversify concentrated stock positions in a tax-efficient way, or guiding pre-retirees with comprehensive planning that ensures every element of their financial life is prepared for retirement. Third, we build portfolios that are low-cost, tax-efficient, and forward-looking. Our early focus on leading Artificial Intelligence companies, for instance, has generated meaningful outperformance for our clients. And fourth, we treat every client as an essential part of the Wealthstone family—not as a number. This ethos has deepened our relationships and led to referrals from clients and professional partners like attorneys and CPAs. These principles are at the heart of Wealthstone's success."

Wealthstone's growth highlights a larger industry trend: high-net-worth investors are increasingly seeking independent fiduciaries who can deliver holistic planning, advanced tax strategies, and investment insights beyond standard portfolio management.

About Wealthstone Private Wealth Management

Wealthstone Private Wealth Management is a fee-only registered investment advisor headquartered in Scottsdale, Arizona. Serving high-net-worth and ultra-high-net-worth

individuals, families, and business owners, Wealthstone delivers comprehensive financial planning and customized investment strategies that align with clients' long-term goals while upholding the highest fiduciary standards.

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