WealthTech Strategy Partners Taps Former Vice-Chairman of Envestnet to Advance Deal Execution Efforts

BOSTON, MA, UNITED STATES, October 30, 2025 /EINPresswire.com/ -- WealthTech Strategy Partners, the only investment bank solely focused on WealthTech advisory, announced today that Gib Watson, CIMA, a former Vice-Chairman of Envestnet, has joined the firm as a Senior Advisor. Watson will play a key role in advancing the firm's deal execution capabilities and deepening its strategic impact across the WealthTech ecosystem.

Gib Watson, CIMA, joins WealthTech Strategy Partners as Senior Advisor to enhance the firm's deal execution and strategic advisory expertise.

With more than 40 years of experience in financial services and technology, Watson brings a distinguished record of leadership and innovation in asset management, wealth management, consulting, and platform development.

Apart from Envestnet, Watson has held senior executive roles at leading firms including Trident Wealth Management Consulting, LLC (Managing Partner), Swan Global Investments (Chief Strategy Officer), Prima Capital Holding, Inc. (Founder, President, and CEO), KPMG US (National Managing Director), and AMG National Trust Bank (Vice President). His experience spans strategic consulting, product innovation, and M&A execution across multiple segments of the wealth management industry.

“Gib's combination of strategic insight, operational experience, and industry relationships is unmatched in the WealthTech space,” said Kendrick Wakeman, CEO and Co-Founder of WealthTech Strategy Partners. “His leadership across some of the most respected firms in our industry makes him an invaluable addition to our advisory team. We're thrilled to have him on board as we continue to expand our role in helping WealthTech companies achieve successful outcomes and sustainable growth.”

“The pace of change in the wealth management industry is creating opportunities for entrepreneurs, industry veterans, and investors alike. I’m excited and honored to join the talented WealthTech Strategy Partners team to help our clients gain a competitive edge and achieve strategic success,” said Watson.

Watson holds an MBA and an MA from Wake Forest University, a BA from Lafayette College, and is a Certified Investment Management Analyst (CIMA) through the Investments & Wealth Institute.

For more information about WealthTech Strategy Partners, visit:
https://www.wealthtechstrategy.com/

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