

Etico Appoints Mike O'Connor as CFO, Reinforcing Advisor-Centric Growth Strategy

Industry veteran joins to strengthen financial infrastructure and support accelerated national growth

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/EINPresswire.com/ -- [Etico](#), a rapidly growing independent wealth advisory platform, announced the appointment of Mike O'Connor as Chief Financial Officer. The strategic hire marks an important milestone as it positions the firm to accelerate its expansion and infrastructure as it enters its next phase of national expansion following a recent investment from Eos Ventures.

Strengthening Financial Infrastructure



Mike O'Connor, CFO of Etico

As CFO, O'Connor will oversee financial strategy, accounting, regulatory reporting, capital planning, and operational finance for Etico and its affiliated entities. He will play a critical role in scaling the firm's financial systems to support new product lines, technology innovation, and strategic recruiting and M&A initiatives.

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*Mike O'Connor, Chief
Financial Officer*

O'Connor brings more than 15 years of leadership experience in wealth management and financial services, with previous executive roles at Realta Wealth (formerly CoastalOne), Atria Wealth Solutions, and Cadaret, Grant & Co., where he guided financial operations through periods of rapid expansion and transformation. He holds Series 27 (Financial and Operations Principal) licensure and is a

Certified Public Accountant in New York State.

"I'm thrilled to join Etico at such a pivotal moment in its life cycle," said O'Connor. "With strong momentum and a clear strategic vision, we're positioned to accelerate our growth in meaningful ways. I look forward to partnering closely with our leadership team to expand the financial footprint that will support the next phase of scale and long-term value creation for our advisors and clients."



"Mike brings exactly the kind of strategic financial leadership we need at this stage of our growth trajectory," said Joseph Leo, Chief Executive Officer of Etico. "His proven track record of building scalable financial infrastructure in dynamic wealth management environments will be instrumental as we execute on our vision to become the platform of choice for independent advisors nationwide. We're fortunate to have someone of Mike's caliber joining our team."

Looking Ahead

Scott Weisman, Chairman of Etico Financial, added: "Mike's addition strengthens our leadership team with a seasoned and forward-thinking financial executive. His depth of experience and strategic perspective create valuable headroom for continued, controlled growth. The future looks bright with Mike helping to steer our financial strategy."

The [CFO appointment](#) comes as Etico continues to expand its advisory, institutional asset management, and brokerage platforms to serve the evolving needs of [independent financial advisors](#) across the country.

About Etico Financial

At Etico Financial, 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 flexible investment strategies to streamline operations, enhance client experiences, 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 and 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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