

Hy Saporta

President & Chief Operating Officer,
Steward Partners Global Advisory



Hy Saporta is President and Chief Operating Officer of Steward Partners, a hybrid registered investment advisor (RIA) with over \$40 billion in assets under management. He has held this role since co-founding the firm in 2013. As a key member of the executive leadership team, Hy is responsible for overseeing a range of critical functions, including operations, technology, risk and compliance, legal and financial matters, product development, and mergers and acquisitions (M&A). His primary focus is on enhancing both the client and wealth manager experience, driving firm growth through strategic M&A, and fostering a high-performance workplace. He

works to implement strategies that promote client loyalty, wealth manager satisfaction, and long-term advocacy.

Before founding Steward Partners, Hy held senior roles at Citi, Morgan Stanley, and its predecessor firm, Smith Barney. At Morgan Stanley, he was a Managing Director and served on the wealth management firm's Management Committee. In this capacity, he led the development of the Client and Field Experience Group, which focused on internet strategy, user engagement, new account onboarding, performance reporting, client communications, and client service metrics, all while ensuring a seamless experience for wealth managers.

Hy is deeply committed to supporting Israeli and Jewish causes. He is a member of the National Council of the American Israel Public Affairs Committee (AIPAC) and is involved in a variety of initiatives that promote the welfare and security of Israel. In addition to serving on the CFS Advisory Council, he serves on the advisory board of the Wealth Management Center at the McCombs School of Business (University of Texas at Austin).

Hy resides in Westport, CT, with his wife, Marissa, their two children, and two Australian Labradoodles.

EDUCATION:

Lehigh University
B.S. Finance, 1995

WORK HISTORY:

Steward Partners Global Advisory	2014 - Present
Smith Barney/Citigroup/Morgan Stanley Smith Barney	1995 - 2014



LEHIGH
UNIVERSITY

College of
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