

— CMO, MORAN WEALTH MANAGEMENT® · SPEAKER · INVESTOR

Compelling statistics, a thought-provoking perspective, and the humor this industry *badly needs*.

Keynotes, panels, fireside chats, podcasts, and broadcasts for wealth management, RIA, and FinTech audiences. Practical over theoretical, with real numbers and no slides full of stock photos.



BIO

About Anthony

Anthony Stich is Chief Marketing Officer of Moran Wealth Management®, a multi-billion-dollar, fee-only fiduciary RIA in Naples, Florida. He has spent nearly two decades leading go-to-market across financial services and FinTech, building brands, demand, and the operating discipline that turns both into growth.

Before Moran Wealth, he was Executive Managing Director at MarketCounsel, Chief Revenue Officer at Entrustody, and a sales and marketing executive at InvestCloud through its acquisition of Advicent (NaviPlan). As Chief Operating Officer of Advicent, he led global sales, marketing, services, and support for NaviPlan, Financial Profiles, and Figlo, following ten years of marketing leadership at AIG VALIC, Guaranty Bank, and Bank Mutual.

A Wisconsin native and father of five, Anthony lives in Naples. Some people call him Mr. Purple; ask him why over an Old Fashioned.

2021

Wealthmanagement.com
CMO of the Year

LUMINARIES

ThinkAdvisor Executive
Leadership Award

Two decades

Go-to-market leadership across
wealth management and FinTech

FORMATS

Keynotes

Panels

Fireside chats

Podcasts

Broadcasts

WHERE YOU MAY HAVE SEEN HIM

Wealthmanagement.com EDGE

MarketCounsel Summit

Fearless Investing Summit

Advyzon User Conference

Future Proof

Jolt!

T3 Technology Conference

Synergy

FPA National

CFP Board Conference

Wealth/Stack

EstateCon

PUBLISHED AND FEATURED IN Reuters · Investopedia · Wealthmanagement.com · ThinkAdvisor · Journal of Financial Planning · InvestmentNews · Financial Advisor IQ · FinTech TV · Asset TV · Advisorpedia · bobsguide

TOPICS

What I'm asked to talk about

Every talk is tailored to the room. These are the themes I come back to most.

01

Branding & authenticity

Why most financial brands sound the same, and what it takes to build one that clients actually remember and trust.

02

Demand generation for RIAs

Building a growth engine inside a fiduciary firm: content, paid, partnerships, referrals, and the measurement that keeps it honest.

03

Operational AI in wealth management

Where AI is already earning its keep in marketing and operations, where it isn't, and how to tell the difference before you buy.

04

Social media that compliance can live with

Showing up as a real person online inside a regulated firm, without creating a supervision problem.

05

Modern marketing strategy

Tell a better story, win a better client. The strategic choices that separate growing firms from busy ones.

06

GTM execution

Getting sales, marketing, and product pulling the same direction, drawn from operating roles on both sides of the table.

HEADSHOTS

Photos



Full-resolution downloads:

[Portrait](#) · [On stage](#) · [Host](#) · [Panel](#)

AV & LOGISTICS

What I'll need

- Wireless lavalier or handheld microphone
- HDMI connection for a presenter laptop; slides in 16:9
- Slide clicker and a confidence monitor, when available
- A short tech check before the session
- Session length and format tailored to your agenda

FOR THE EMCEE

Suggested introduction

Our next speaker leads marketing for Moran Wealth Management®, a multi-billion-dollar fiduciary RIA, after nearly two decades building brands and growth engines across FinTech and financial services. He's a Wealthmanagement.com CMO of the Year, a ThinkAdvisor Luminaries honoree, and, if you spot purple shoes on stage, the man some people call Mr. Purple. Please welcome Anthony Stich.

FOR EVENT ORGANIZERS

Let's have a chat.

Send a date and an audience and I'll tell you quickly whether I can make it work.

anthonystich.com/contact

linkedin.com/in/amstich