Nexus Strategy Celebrates 20 Years as the Wealth Management Industry's Leading Go-to-Market Consulting Firm

Two decades of building market presence, producing thought leadership, and connecting the firms that define the independent advisory ecosystem

LARKSPUR, CA — April 11, 2026. Nexus Strategy, LLC, the independent wealth management industry's premier go-to-market consulting firm, today announced the celebration of its 20th anniversary. Founded on April 11, 2006, by Timothy D. Welsh, CFP®, Nexus Strategy has spent two decades serving as the strategic partner of choice for technology companies, custodians, wealth management platforms, investment product suppliers, broker-dealers, and financial institutions seeking to build meaningful market presence with the independent RIA community.

From a boutique consultancy launched during the early stages of the breakaway broker movement, Nexus Strategy has grown into one of the most recognized and prolific voices in independent wealth management, advising more than 100 organizations, producing hundreds of thought leadership assets, and playing an instrumental role in shaping some of the industry's most recognized events and programs.

"Twenty years ago, I believed that the independent advisor movement was going to reshape financial services, and that the firms serving those advisors deserved a dedicated, knowledgeable partner to help them navigate it," said Timothy D. Welsh, President and CEO of Nexus Strategy. "Two decades later, the independent RIA channel has become the dominant force in wealth management, and Nexus Strategy has had the extraordinary privilege of helping to build many of the platforms, programs, and narratives that define it. I am deeply grateful to every client, partner, and colleague who has been part of this journey."

Nexus Strategy's 20-year milestone is marked by a range of achievements that reflect both the firm's depth of expertise and its commitment to advancing the industry as a whole.

Architect of the Wealthies. Among Nexus Strategy's most visible and enduring contributions to the industry is its role in creating and building the Wealthies—wealthmanagement.com's annual industry awards program and one of the most prestigious recognition events on the wealth management calendar. Now in its twelfth year, the Wealthies celebrate the firms and individuals driving innovation and excellence across the advisory ecosystem. The program has become a defining moment in the industry's annual calendar, drawing entries and recognition across dozens of categories spanning technology, practice management, investment products, and firm leadership.

Hundreds of Go-to-Market Engagements. Over 20 years, Nexus Strategy has served more than 100 organizations spanning every segment of the RIA ecosystem, from category-defining technology platforms, to leading custodians and financial institutions, to emerging fintech companies seeking their first meaningful foothold in the independent advisor market. The firm's go-to-market engagements have included comprehensive market strategy development, messaging and positioning, media relations, distribution channel strategy, and tactical execution across every relevant channel in the RIA landscape.

Prolific Thought Leadership Output. Nexus Strategy has been one of the most active and consistent producers of original thought leadership in the independent wealth management space. The firm and its principal have contributed more than 200 articles, white papers, issue briefs, advisor profiles, and case studies to leading industry publications. Timothy Welsh is a regular contributor and columnist whose commentary on practice management, technology adoption, distribution strategy, and the future of independent advice has been cited, shared, and referenced across the industry.

Conference Speaker and Moderator. Timothy Welsh has established himself as one of the most in-demand moderators and speakers in the independent advisory space, appearing at more than two dozen industry conferences and events annually. His appearances span the industry's most prominent gatherings, where he brings a combination of market depth, interviewing skill, and genuine industry relationships that consistently produce candid, high-value conversations for attendees.

Research, Advisor Interviews, and Case Studies. Nexus Strategy has produced original research and primary-source content on the independent advisor market for two decades, including advisor interviews, acquisition case studies, benchmarking analyses, and market intelligence reports that have shaped how firms understand and approach the RIA channel. The firm's case study work in particular has helped dozens of organizations translate client success stories into compelling market narratives that accelerate trust and credibility with prospective advisor partners.

As Nexus Strategy enters its third decade, Timothy Welsh expressed both gratitude and optimism about what lies ahead for the independent advisory channel and the ecosystem of firms that serves it.

"The RIA industry is at a genuine inflection point, with AI, consolidation, generational wealth transfer, and evolving client expectations that are reshaping every dimension of the business," Welsh said. "Nexus Strategy is as energized and relevant today as at any point in our 20-year history. The firms that understand how to build trust, demonstrate expertise, and reach the advisor community authentically will define the next chapter of this industry. We look forward to helping them do it."

Nexus Strategy is celebrating its anniversary throughout 2026 with a series of thought leadership initiatives, advisory community events, and a retrospective on 20 years of the independent wealth management industry's evolution. Additional details will be announced in the coming months.