Brittany Boals Moeller Goldman Sach's Bay Area head of wealth management

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By Simon Campbell – Special Projects Editor, San Francisco Business Times

A wave of IPOs and well-funded AI firms is minting millionaires across the Bay Area. The competition to manage this newly created wealth has never been more intense.

Brittany Boals Moeller heads Goldman Sachs' West Coast wealth management services. Arriving in the Bay Area in 2025, she stepped into a market with plenty of opportunity caused by the collapse of First Republic and Silicon Valley Bank in 2023 and the nascent AI boom.

The contemporary wealth manager's responsibilities go far beyond investment, estate planning and tax guidance. Tickets to Wimbledon? Establishing a philanthropic organization? Financial literacy classes for kids? Services today are nuanced and bespoke.

Boals Moeller joined Goldman in 2007 as an analyst, becoming a managing director in 2019 and partner in 2024. Originally from Arkansas, she served as region head for Goldman's

Southeast Private Wealth Management in Atlanta before taking the same role in San Francisco in 2025.

What is distinct about Goldman's Bay Area wealth management client base? It's unique in so many ways. A lot of people here invest pretty consistently in startups and private-market opportunities. So even outside of their day job, they probably have a portfolio of illiquid investments. If you just map the overall balance sheet of that talented founder or engineer, developer pool, they've just got more complexity to their wealth.

It is a younger client base, which is exciting in so many ways. A lot of people here are so smart and so talented that there's a desire to self-manage a lot of this.

Is that a challenge for someone in your line of work? There's nothing wrong with self-managing, but there's a lot of complexity and overlap between investing and tax and personal outcome success.

A lot of the most important advice that we give has nothing to do with wealth management. It's around tax and structuring and just giving some broad strokes as the company evolves.

What is it like working with founders and entrepreneurs? There's a lot at stake for these founders. Where we come in is just to say, "Hit the pause button for a moment, and let's actually think about how we set up you and your team to think about your personal outcomes."

A lot of that actually has nothing to do with investing. It starts with tax — helping people think about the structure of the company and how they can optimize how they think about philanthropy very early on, as a tool to do a lot of good for the world and give back as they're succeeding.

What are some of the complexities of advising clients in this market? The Bay Area is very expensive. In order to buy a house or even to exercise options and pay the taxes on that, clients sometimes may need a loan to facilitate that.

And then eventually, M&A or an IPO, sometimes public stock comes into play. So there we're helping to think through and educate: Here's how to be a responsible shareholder of a company. If you're an employee as a founder and an affiliate, how to think about your restrictions, and how to abide by those restrictions, but still diversify over time through things like 10b5-1 plans or block trades. So it's an evolution of conversations and education, and there's no reason anyone should know anything about this, unless you've done it before. That's where we come in.

What kind of advice do you give people who are facing a sudden increase in wealth? To just make sure you have really good advisers around the table who you can call.

No time is too early. There's no conversation that we don't want to have today, no matter what development stage of a company. Existing wealth levels don't matter.

What are some of your other focuses at Goldman? I run In the Lead, which is focused on women clients. It's not pink Goldman Sachs — this is substantive content. We have global convenings where we bring people together. It's less about Goldman being at the center of those conversations and more about us facilitating conversations with really amazing clients and people.

Next GS is our platform of resources for the next generation. If you look at wealth-creator clients today, they are increasingly focused on preparing the next generation, not just financially, but holistically sharing stories with other families about what they're doing to prepare future generations.

What are some things Goldman is doing to prepare future generations? Starting at 15, we have investment courses. It's this great gift to clients to be able to say, "Hey, we'll teach your kids how to invest." Everything from knowing how the economy works to how the stock market works, why would you own a bond? It's invaluable.

How do you see your team growing in San Francisco? This is a very large office for Goldman Sachs. I anticipate that we are going to grow significantly, based on the demand that we've seen last year,

We are adding a significant number of people to deliver family office services. The second area is tax and trust company advisory. We're accelerating that because of the growth that we see.

The third would be private markets and a focus on the VC community. The third would be private markets and really a focus on the VC community. The VC community here is so critical, so we're hiring specific resources dedicated to that group, to deliver advice and resources to them.

About Boals Moeller

- **Born**: Arkansas
- **Residence**: San Francisco Bay Area
- **Education**: Bachelor's, NYU Stern School of Business
- **Favorite Bay Area restaurant**: Wayfare Tavern

About Goldman Sachs

- **Founded**: 1869
- **HQ**: New York City
- **Total employees**: Approximately 50,000
- **What it does**: Global investment banking, securities and asset and wealth management
- **2025 revenue**: $58.3 billion
- **Did you know**: Asset and wealth management was a key driver of Goldman's 2025 results, with growth tied to private-markets activity, lending, and high-net-worth client engagement.