

Natalea Simmons and Simmons Private Wealth Group: Celebrating a Year of Leadership and Growth at Stifel



Natalea Simmons and her team are approaching their one-year anniversary at Stifel, and they've already made a significant impact..

Managing Director/Investments [Natalea Simmons](#) is a powerhouse in financial advising. With an Accountancy degree from the University of Missouri, an MBA from Washington University, and numerous certifications, she brings extensive expertise to her role.

In addition to being an incredibly accomplished financial advisor, Natalea is an amazing leader of her all-female team, so we were thrilled when she brought [Simmons Private Wealth Group](#) to Stifel in the fall of 2023. To mark their first anniversary, I sat down with Natalea to discuss the team's transition, the culture shift, balancing work and family, and her leadership approach.

A New Chapter: Finding the Right Fit

Natalea entered the industry in 2001 and, with the support of her team – Client Relationship Manager [Emily Cuba](#) and Senior Registered Client Service Associate [Leslie Kollar](#) – manages over \$470 million in client assets. However, after spending over two decades at Merrill Lynch, she felt ready for a change.

“I’ve reached a point in life where relationships are my top priority, which includes friends and family, but just as importantly, clients and colleagues,” she says. “The firm I was with had shifted away from focusing on culture and taking care of their clients and advisors.”

So, she needed a firm that matched her values and quickly realized Stifel fit the bill. Stifel’s #1 ranking in the employee advisor segment of the J.D. Power 2024 U.S. Financial Advisor Satisfaction StudySM for two consecutive years was an added bonus.*

“Stifel’s culture drew me in – I had heard glowing reviews from former colleagues who joined. I was looking for a client-centric firm that truly puts clients first, and Stifel does just that.”

Navigating the Complexities of Moving Firms

Despite Stifel’s support and Natalea’s confidence that joining Stifel was the right move, the transition process wasn’t without its challenges.

“The industry doesn’t allow you to share the news with your clients beforehand,” she explains. “Switching firms overnight without warning can be tough on relationships.”

Luckily, she and her team were welcomed with open arms, and many were ready to pitch in at a moment’s notice.

“Stifel’s Transition Team worked tirelessly – days, nights, and weekends – to help us through the paperwork process, making the transition as smooth and efficient as possible.”

A Breath of Fresh Air at Stifel

Arriving at Stifel was a culture shock – in the best way. Natalea and her team transitioned from a competitive environment to one where everyone is supportive, allowing her to focus entirely on providing clients with the best possible service and advice.

*For J.D. Power 2024 award information, visit [jdpower.com/awards](https://www.jdpower.com/awards)
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“We joked that they must be piping something through the ventilation system, because the atmosphere was immediately positive and healthy when we arrived,” she reflects. “Certainly a strong contrast from the atmosphere that we left behind.”

Natalea and her team have been particularly impressed by the responsiveness from everyone, including leadership. Whether it’s running into CEO Ron Kruszewski around town, having regular calls with President Jim Zemlyak, or keeping up with our ongoing conversations in the office, Natalea feels truly supported and always tells her clients how happy she is at Stifel.

“I wish every single company shared these values and provided such a nurturing environment for employees. It’s so important for happiness and success.”

Balancing Work and Life

Natalea successfully balances raising three boys at home while excelling at work, but it’s not as easy as she makes it seem.

“Juggling everything is challenging. I can’t let any one ball drop, so I push myself to prioritize, set boundaries, and give 100%. Honestly, too many times over the years, it’s been self-care that had to wait,” she says. “It’s stressful, but I have a great support system of people behind and beside me.”

Natalea contributes much of her success to her team.

“Emily has been with me for thirteen years and knows me inside out. She has my back, and I trust her implicitly. Leslie has been with me for six years and is incredibly responsive. We’re a tight team that works together to put clients first.”

Her leadership goes beyond professional collaboration; she is also deeply committed to supporting her team on a personal level. Not only does she provide them with the flexibility they need to meet their personal needs, but she also actively empowers and encourages them to prioritize their families.

Natalea also acknowledges her husband as a major supporter.

“We had to have tough conversations early in our relationship. When I started my career, we were making the same amount of money, but we had to decide whose career came first,” she explains. “He let me put my career first and has supported me every step of the way. Having a great partner in life has been a blessing because I don’t have one here. I’m a solo advisor.”

Her incredible passion for her job makes it easy for her to maintain motivation to advance professionally, even while raising a family.

“I love my kids as much as I love my job, and that’s a real blessing. I’ve created great memories in both areas, but nothing is more rewarding than being financially independent and successful as a woman. Knowing that I’m helping support my family and don’t necessarily have to rely on my husband is an empowering feeling I wish more women had the opportunity to feel.”

Having grown up with a remarkable group of strong, single women, Natalea prioritizes financial independence.

“I like to say a team of women warriors raised me. My grandmother became an orphan at six and a widow at 57. My mom divorced at 26, so she raised the three of us with help from my grandmother and my three great-aunts – all single and financially independent. They wanted me to follow in their footsteps and were always adamant that I needed to do this for myself and my family from a young age.

Creating Community and Mentoring Others

Given her background, Natalea knows first-hand how much of a difference having female mentors can make – and she was excited to find a strong spirit of female mentorship at Stifel.

“Right from the start, Stifel invited me on the Chairman’s Council trip to Mexico, where I met other female leaders. We had dinner together, where we decided then and there to do monthly Zoom meetings. And these Zoom meetings have been invaluable.”

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“The top women of our firm meet to discuss different topics, ranging from marketing and teaming to alternative investments. We always wrap up by sharing what we’re struggling with and what’s going well. Women share materials to help with client conversations, best practices for navigating industry challenges, and strategies for personal and professional growth. It has been phenomenal.”

This network provides a welcoming space in an industry still largely dominated by men.

“You can feel a little isolated because there are so many more men than women, but this network has made me feel strong, happy, and connected,” she says. “It reassures me that I’m not missing out and have great people to reach out to any time.”

Words of Wisdom for the Next Generation

In the spirit of camaraderie and mentorship, Natalea offers some key insights.

“Moving from being a tax accountant to an advisor required a big leap of faith. I went from a salaried position to a fee-based role where income depends on the ability to build a successful business. It was very frightening but also incredibly rewarding.”

Faith has been crucial throughout her career.

“I’ve learned that when one door closes, another opens.



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Over the past thirty years, this has proven true. It’s a mix of hard work, good karma, and luck, but it is essential to stay the course and never give up, even when it’s tough.”

A lesson she learned early in her career has been particularly useful.

“An older male advisor once told me, ‘When you have really good days, write it down because you’ll need those notes to get you through the really bad days.’”

She also emphasizes the importance of self-belief.

“Women often hesitate to take risks or stretch themselves because of self-doubt,” she says. “I have many designations on my business card, driven by a need to prove my competence and keep up with men. It’s what I call ‘head trash.’ I wanted to be seen as fully competent and equal. Women may or may not need to work harder, but I didn’t want to find out what would happen if I didn’t.”

For those struggling with self-doubt or imposter syndrome, Natalea advises taking every educational opportunity.

“You can’t control who you run into or what opportunities come your way, but you can control your qualifications, education, and attitude. Hopefully, the rest will fall in line.”

To wrap up, Natalea mentions the value of ambition.

“It’s okay to be ambitious. It’s okay to be passionate. And it’s okay to not be apologetic for those things,” she says. “As women, we sometimes shy away from those and feel we can’t be those things, but it’s okay. The world is moving in the right direction, so it will only get better from here.”