

## INDUSTRY NEWS

# Yeske Buie's succession plan: Q&A with the 'C3Os' taking over in 2026

By [Tobias Salinger](#) December 16, 2025, 3:50 p.m. EST 13 Min Read



From left to right, CEO Elissa Buie, Managing Director Dave Yeske, Chief Operating Officer Lauren Mireles, Chief Investment Officer Yusuf Abugideiri and Chief Planning Officer Lauren Stansell of Vienna, Virginia- and San Francisco-based registered investment advisory firm Yeske Buie posed together ahead of the company's leadership succession next month. *Yeske Buie*

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At the beginning of next year, two stalwart planners who built their registered investment advisory firm and shaped countless financial advisors' careers will step down from their roles.

Elissa Buie and Dave Yeske, spouses who are the founders of Vienna, Virginia- and San Francisco-based RIA firm Yeske Buie, will hand the reins of the firm to its three partners: Yusuf Abugideiri, Lauren Stansell and Lauren Mireles, the firm [said last month](#). The company calls the three successors its "C3Os."

Besides the change at the top, the company will alter its name in January to YESKEBUIE, which it described as "turning what began as two proper nouns into an adjective that defines the highest standard of excellence in the financial planning profession."

In addition to building the RIA into a firm with nearly \$1 billion in assets under management, the founders have each acted in leadership roles at the Financial Planning Association [from its launch 25 years ago](#), written widely read papers in the field that have shed light on planning practice, careers and history, and taught aspiring planners at Golden Gate University. Both are past winners of the FPA's P. Kemp Fain, Jr. Award for lifetime achievement in the field, among other honors throughout their careers.

Buie and Yeske pledged to keep stakes in the firm, remain co-chairs of its board and attend future events at Yeske Buie, even as they drop the day-to-day duties of leading the RIA. But in the firm's announcement, they wrote that their firm's "standard of excellence is nonnegotiable," and the sole difference that clients will notice is the company's "ongoing improvement as the firm continues to be a learning, evolving leader in the financial planning profession."

"The firm is committed to being independently owned, ensuring that its leadership retains full control

over decision-making and client experience," the company said in a press release. "This independence allows YESKEBUIE to continue offering real financial planning (strategic and human-focused) to real human beings for whom they care from the bottom of their hearts."

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*The below interview with the incoming leadership of the firm has been lightly edited for clarity and length.*



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## A big meeting with roots to more than a decade earlier

**Financial Planning:** So the three of you will be the next CEOs of Yeske Buie. How did it come about that the three of you would take on this combined role in the next chapter of one of the most influential firms in the profession?

**Yusuf Abugideiri:** We have to go back to October 2023. We had a partner's retreat. The five of us got together at Dave and Elissa's place in Healdsburg. And it was at that retreat that they shared their plans to retire at the end of 2025. The C3O idea was introduced there, but the focus of that preliminary conversation was with each of us stepping into our current roles.

So myself as chief investment officer, Lauren Stansell as chief planning officer, Lauren Mireles as chief operating officer with — I think it was in parentheses at the time — chief compliance officer too. But the

idea being that we needed to step into roles of greater responsibility and establish our lanes, with the idea that, by the end of 2025, we needed to have it all figured out so that we could run the place.



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**Lauren Stansell:** You went back to 2023 but if we think really about all this, it goes back to 2009. Yusuf, I think when you started, it was a huge goal of yours to become a partner one day, and that's been a lens for you in everything you've done in your career here. And along the way, the two of us joined in on that, jumped on that train, and the three of us became partners in 2019 and then, in 2023, in our current positions.

It's been, much to Dave and Elissa's credit, a really long pathway to get to this place of where they wanted to be able to retire and step away from the day-to-day and know that the firm was going to run exactly as it would have if they were at the helm. It's been a long process. And it was that 2023 meeting where it really started to come together as what the next steps of this huge transition would look like. It was a fun meeting. And we had some interesting conversations around, 'Is it one of us? Is it two? Is it a rotating CEO?' And ultimately, we came to the decision of all three of us, because that's really how the three of us have operated all along, and there are some fun analogies and things we've come up with as to why we think it's going to work really well.

**Lauren Mireles:** Where you ended was kind of the perfect segue, Lauren. I was thinking that just our leadership and then our dynamic together has been a natural emergence over our careers, in our time together. And not only are we talking with each other all day long at work. I get messages from them all the time on my phone about their kids and their personal lives and sharing playlists and pictures and videos and all kinds of really neat memories. So we have that connection outside of work too, and it's really nice.

I think that dynamic is one of the biggest reasons that it works so well. Sure, our competence, our experience, the mentorship that we've had from Elissa and Dave, our education – we all have master's degrees – but all of that kind of plays together under the relationship bucket, too.

**LS:** Yeah, I think that part is really important and why the three of us work so well together. First and foremost, we are completely values aligned with Dave and Elissa, and have been from day one, and that is a huge lens: Everything is about our clients and our values. And so that, of course, is like a requirement.

But Dave and Elisa, obviously, are married, and they spend 99% of their time together. They can talk about and think about clients all the time, and what we need to be doing for clients and what things are going on, or what we might need to be thinking about differently. And the three of us having the relationship we have, of such closeness and such best friends, in addition to business partners – it means that it's really easy for us to have those conversations when something needs to be discussed on a Saturday at 6 o'clock and we send a message. We're like, 'Hey, we've got to figure something out.' That's the norm for us to be talking all the time anyway. And it's as close as we can get to them without all of us being married and living under the same roof.

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**FP:** Well, the whole profession, in a sense, is thinking about some aspects of these questions, these topics that the three of you brought up, just because there are so many founders of large advisory practices and RIAs who are [set to retire over the next decade](#). What about the transition at your firm? Whether from the retiring generation or the successor generation, what are some lessons that they could take away from the transition at your firm?

**YA:** You can't start succession planning early enough. Dave and Elissa were conceptualizing Yeske Buie before its official birth on Jan. 1, 2008, and they were having conversations years prior to that. They were already planning for their dispensability.

At the time, initially, the goal was 2020. Ultimately, 2025 ended up being the year, and that was perfect timing, I think, for a number of reasons. But having [the objective of their dispensability](#) being feasible from the beginning of the firm's life informed everything about the way my career unfolded, the way the past 15-20 years have unfolded for the firm. That was the point of focusing more.

Lauren used the word "lens" earlier. That was the lens through which all decisions were made, and that's what built an infrastructure that could persist after their careers concluded.

**LS:** There has to be significant trust and communication, and you have to be able to have a lot of hard conversations for founders to be handing off their firm. As we see our clients, too, it is a huge deal, and it's not easy for them, and it's not easy for people coming in.

At the end of the day, you have to know that you're all on the same team. It's not an 'us versus them.' One of the things that we talked about recently was that it's not a new baton that we're carrying forward, or a new torch that we're carrying forward. It is the same torch that has always existed that we are now carrying, and they've been right with us, and now they'll be on the sidelines cheering, but it's still the same exact torch. It's that underlying knowledge that everyone's on the same team, and that you have to be willing to have the hard conversations and have a safe space to know that you can have the hard conversations to make sure it's done right.

I'm the protector of the values of the firm, so to make sure that every decision that's made is through the lens of the values and it serves the clients – it's clients first and foremost, and the team – and their passion is to serve those clients. It's not always easy. There are hard conversations to have and tough moments.

**LM:** There's a lot at stake in a transition like this. There's a lot at stake for the owners involved. More importantly, there's a lot at stake for the clients, ensuring that they continue to get the care and the standard of service that we expect of ourselves.

Under that umbrella, it's not easy. We have gone through a lot of ups and downs, and I think in a more appreciative way, it just takes a lot of intentionality, a lot of dedication, a lot of sacrifice.

Lauren hit the nail on the head with communication as well. That's a big piece, and the trust and the relationship building, but it's not easy. It's not for the faint of heart, and it's incredibly rewarding for all of those parties involved as well, as we're seeing as we near the actual date.

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## **The meaning of independence**

**FP:** One thing that the company made clear in the announcement is the commitment to being

independently owned and being independent. And that is a very strong ideal in the planning profession. But sometimes there are some [different definitions of "independence"](#) and [what it means as a financial advisor](#), as a financial planner. What does "independent" mean in terms of practice and in terms of structure at your firm going forward?

**YA:** To speak to both parts of your question, in terms of practice, we feel very strongly about the ways that financial planning should be done, and we want to be able to practice financial planning as fiduciaries with our clients' best interest first and foremost, in the way that we believe it should be practiced. And we don't want to be beholden to anybody else's expectations, considerations, requirements.

We take the responsibility and the trust that our clients place in us very seriously. We three have had the privilege of learning from two of the best who have ever done it, and so we feel clear about what the expectations and standards are internally. And for us, that's where it begins and ends.

In terms of structure, we want to keep this thing – I'll use air quotes – and say "in the family," but it's us. We want this firm to persist as it has, as it is, and hopefully as it will be, and that's within our group.

It's important to note what that requires. Dave and Elissa are making an incredible sacrifice in terms of not going out there and maximizing the amount that they could receive for the shares that they're selling. And, for them, the tradeoff is worth it, right? It's protecting the heart and soul of the firm and ensuring that clients continue to receive care and service to the standards they've come to expect. We don't take that part lightly, either. I mean, we're all good at math. We can all see the numbers, and we understand the differences between selling externally versus selling internally, and the trust and faith that Dave and Elisa have put in us is a big part of what we're trying to honor here.

**LS:** I think the only thing I would say is just to reiterate that it is a completely values-based client decision that Dave and Elissa have [made to internal succession](#). And that has been their desire from day one, and it's all about the clients and making sure that they and every generation of their families get exactly the Yeske Buie way, and that's never compromised.

**LM:** "Live Big" is our overarching tagline, and we have six total core values. The one at the top of the visual sheet is "Client big." And we believe, to best serve others, you must feel the world through their

hearts. And that is the standard, the practice, the philosophy behind why we want to remain independent, so that we can continue to serve clients in that way.

Maybe a structural note — I think the fact that we are next-generation partners and owners also helps us to relate to and care for our clients' next generation as well. I can think of a few examples of clients who Yusuf has met — and it was the grandchildren of clients — and connected with on a personal level, and then able to grow that relationship and ultimately take it on. And then their kids and continuing on and on. So just that ability to serve multiple generations — I think we're well-suited to do it, and it's something that we're really passionate about, as well.

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## Thoughts for the future

**FP:** Thank you for taking the time to do this. I want to just leave it open on the last question,, Is there anything else that our audience should know about this transition, or anything else involving Yeske Buie?

**LS:** It's been so heartwarming to see how excited clients are for Dave and Elissa. We have had some incredible conversations over the years. You know, we announced their retirement last year, about this time, and so we've had conversations over the year, and then, after the announcement that went out last month, some really, really special reactions or reflections on their careers. And we have clients who are like, "I'm so excited, and I'm so heartbroken. Like, how can two things be true?"

And so that's been really fun to see, because obviously we have really great client relationships, and I can only imagine what my client relationships will look like in 20 to 30 years from now in my career. So it's been really special to see just how appreciative clients are and how excited they are that Dave and Elissa now get to do what they have helped so many clients accomplish in their own lives.

**LM:** I'd like to emphasize, too, that we can't do this without the team that is supporting us. This transition — serving clients and entering into this big role — they're big shoes to fill. As Yusuf talked about, Dave and Elissa are two of the best financial planners in the profession, and so to enter that and, hopefully, obviously meet but exceed. I think they have the same expectations for us to exceed their

accomplishments. We have a fantastic team supporting us and supporting our clients, and so we're very grateful for them as well.

**YA:** This is a dream come true for each of us, for all of us, for the firm, for Dave and Elissa. I say this all the time, that I grew up at Yeske Buie. To be able to say that we each worked in every role, from intern to co-CEO. You know that we've done this over a decade and a half. I mean, it's a bit mind boggling, if you really sit down and reflect.

And then I get to have an experience like one I had just earlier today, stepping into a client meeting with folks that Dave has been working with for decades. And I'm not even the lead planner on the call or on the relationship. That's one of our other team members, but I was invited into the conversation. It was investments-focused. That's my expertise. And to have the reaction from the clients be, "Oh my gosh, we get Yusuf?" Like they're excited, they're honored that I'm there. Meanwhile, I'm honored to have the opportunity to fill Dave's shoes, right?

And so it's so much positive energy, and it's magnified and compounded by all the relationships that are participating in this positive feeling. It's really special. We can acknowledge the seriousness, we can acknowledge the responsibility, and so on — and all those things are true — and we're having a lot of fun. I mean, we just really enjoy what we get to do, who we get to do it with, and who we get to do it for. And that's pretty cool.

**Tobias Salinger** Chief Correspondent, Financial Planning    

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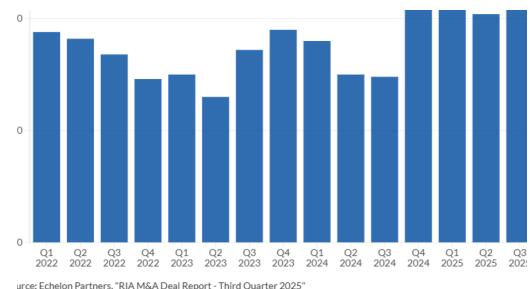
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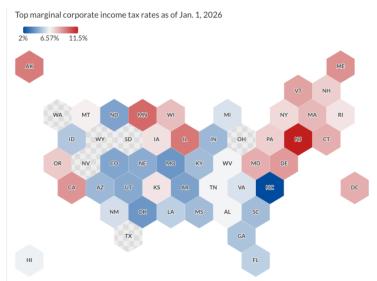
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