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About Us

Why Intellectus?

A Different Approach

Our History

Our name reflects the dynamism of the clients we advise. We work with a network of accomplished clientele—people who make a mark on the world through their intellect.

“Intellect” is defined as the ability to come to the correct conclusion about what is true and to solve problems. We are privileged to work with people who marry their intellect and ingenuity, creating lasting value for themselves, their families, their companies, and their societies.

Intellectus combines “intellect” and “us.” But it’s not just our intellect. It’s the talent and substance, connectivity and passion of the people we advise. When you become a client of Intellectus, you not only gain an advisory team that is utterly focused on you and your needs. You also gain a broad and diversified circle of like-minded peers who share ideas, experiences and opportunities, generating connection and insight across an elite group of innovative leaders.



Our People

“Entrepreneurs know that people drive the difference. The foundation of any successful enterprise is talent. We’re as selective in our team as our clients are in partnering with us.”

David J. La Placa, Founder, Chairman, and CEO



David J La Placa

(<https://www.linkedin.com/in/david-j-la-placa-4ab26/>)

Founder, Chairman, CEO

David La Placa has led Intellectus Partners since its founding in 2015, keeping client-centric solutions, relationship banking, and innovation at the forefront of his leadership. He leads the Global Executive Investment & Operating committees and oversees all investment strategies. David's energy, vision, and hands-on experience in multiple ventures solidify his connection to entrepreneurs. He speaks not from a distant removal to their needs, but a vital understanding of the satisfactions and challenges of entrepreneurship today.

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Jay Casey

(<https://www.linkedin.com/in/jay-casey-47828/>)

Co-Founder, President

Jay Casey is a co-founder and President of Intellectus Partners. He specializes in advising entrepreneurs, executives, venture capitalists, and family offices. Jay serves on the Global Executive Committee and the Global Investment & Operating Committees. Within Intellectus, he is responsible for day-to-day oversight of key operating units, including Investment Planning & Analytics, Strategic Product Management, and Risk & Quantitative Analysis.

Prior to founding Intellectus Partners, Jay served as a Director at Deutsche Bank, where he was an

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Kelly Morton

(<https://www.linkedin.com/in/kelly-morton-b5695916/>)

Vice President of Client Planning, Associate Partner

Kelly Morton is Vice President of Client Planning and an Associate Partner with Intellectus Partners. She applies her quantitative skills and analytical insights to help clients pursue a range of financial goals. She holds a number of responsibilities within the team related to financial planning, modeling financial returns and cash-flows, reviewing client portfolios, implementing asset allocation, interfacing with our Trust & Estate processes, designing customized reports, assessing investment opportunities and answering client inquiries.

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Tina Chan

(<https://www.linkedin.com/in/tinahchan/>)

Vice President of Operations & Administration, Associate Partner

Tina Chan is Vice President of Operations & Administration and an Associate Partner with Intellectus Partners. She oversees all client service and operational functions for the team. Organized, diligent, and responsive, Tina is a central hub for client needs and inquiries. Her responsibilities include oversight of all administrative functions and operations.

Prior to joining Intellectus, Tina worked for five years with David LaPlaca and Jay Casey at Deutsche Asset & Wealth Management as lead sales assistant primarily focused on our Venture &

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Alice Wu

(<https://www.linkedin.com/in/alice-wu-4567602/>)

Head of Asia Pacific Region, Wealth Creation & Preservation

Alice Wu is Head of Asia Pacific Region, Wealth Creation & Preservation for Intellectus Partners. Prior to joining Intellectus Partners, she was a Managing Director and President of Asia Region with Robertson Stephens. Prior to that, Alice was a Vice President with Credit Suisse Securities (USA) LLC in San Francisco. She advised wealthy Chinese individuals and families in the United States as well as provided institutional-level customized financial solutions to her clients in Asia. Before Credit Suisse, Alice was with Morgan Stanley Private Wealth Management in San Francisco. Alice has earned two master's degrees, one in Business Administration from New York University and another in Public

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Timothy Ng

(<https://www.linkedin.com/in/timothy-ng-5776311/>)

Head of Intellectus X Labs

Timothy (Tim) Ng is the Head of Intellectus Private Markets and the Group Head of Entrepreneurial & Corporate Advisory. Tim leads our practice which provides advisory services to entrepreneurs and works with the management teams of our client companies and portfolio of investments. With a unique background that spans investment banking, strategy, operations and venture investing, Tim works with our entrepreneurs on all aspects of their company life-cycle while accessing, building and maintaining our vast partner network.

Your Lifecycle

We launched Intellectus Partners to address the needs of entrepreneurs and executives. We believe that “wealth management” is too constrictive a term for what we offer. Our slate of services is broad, yet strategic. We are not all things to all people, but we do have an acute understanding of the pivotal issues that entrepreneurs encounter in their personal lifecycle. We recognize that the lines dividing personal and professional wealth are often blurred; we help our clients manage risk in their businesses and in their portfolios. We seek opportunities in the capital markets and in ventures throughout Silicon Valley and beyond.

Entrepreneurs	+
Your Family	+
Global Investors	+
Venture Investors	+
Philanthropy	+

Your Goals

A properly executed plan starts with an objective- a goal.
Our methods are a goals based methodology.

Plans create discipline
Discipline creates opportunities
Opportunities create value
Value reduces risk
We do not like risk
Risk mitigation supports goal achievement
Goals are what we achieve!



Our Process

We ground our approach in goals-oriented advisory. Client goals shape everything we do—from long-term strategy to day-to-day tactics. But goals are just our starting point or springboard. Attaining those goals is our focus, and that's where our knowledge and experience take flight.

When people speak with us, they quickly perceive that we offer something different. Many advisors pay lip service to customization. For us, it is the lifeblood of what we do. We thrive on the nuances of each client, each family, and each business. We welcome the intricacies and special circumstances that underlie each relationship.

Our process begins with extended conversations. We delve deeply into a client's background, makeup, needs, and desires, so that we can develop a cohesive plan to reach their goals. The more we know, the more effective we are.

Our Partners

"Entrepreneurs recognize that you can't be the best at everything; it's far easier to be the best at one thing. We channel that mindset in selecting our partners, each of whom is outstanding in a particular area. Together, we unleash the force of targeted expertise to advance the needs of our clients."

Jay Casey, Co-Founder and President

Harnessing the Power of Precision

The clients we serve have distinctive and refined needs. They don't want "good enough." They want the best available. Our position as independent advisors allows us to seek out the resources that best fulfill the niche needs of our clients. We don't tether clients to average resources from a broad-based provider. Rather, we winnow out the all-stars within each field, identifying the providers with clear advantages and unifying the whole through precise collaboration.

Some of our Key Partners include:

HPM Partners, Paul McGloin	+
Dynasty Financial Partners	+
Fidelity	+
Addepar	+

News/Media

External articles about us and our founders

Intellectus hires new Head of Asia Pacific Region, Alice Wu

(https://www.bizjournals.com/sanfrancisco/potmsearch/detail/submission/6430018/Alice_Wu)

Alice Wu will take the lead on the firm's expansion into covering entrepreneurs and public executives in th...



(https://www.bizjournals.com/sanfrancisco/potmsearch/detail/submission/6430018/Alice_Wu)

Intellectus hires President from Robertson Stephens for Asia Pacific Region

(<https://www.bizjournals.com/bizwomen/news/latest-news/2017/06/finance-millennials-show-strong-saving-habits.html>)

Alice Wu has been named head of Asia Pacific Region, Wealth Creation & Preservation at Intellectus Partn...



(<https://www.bizjournals.com/bizwomen/news/latest-news/2017/06/finance-millennials-show-strong-saving-habits.html>)

The Spotify IPO: David J. La Placa in the Wall Street Journal

(<https://www.wsj.com/articles/what-spotifys-un-ipo-means-for-wealth-management-1503068563>)

If Wall Street doesn't adapt, direct-listing model could undercut a key relationship tool for advisers



(<https://www.wsj.com/articles/what-spotifys-un-ipo-means-for-wealth-management-1503068563>)

Intellectus Partners Co-invests with Sequoia in Orbital Insight

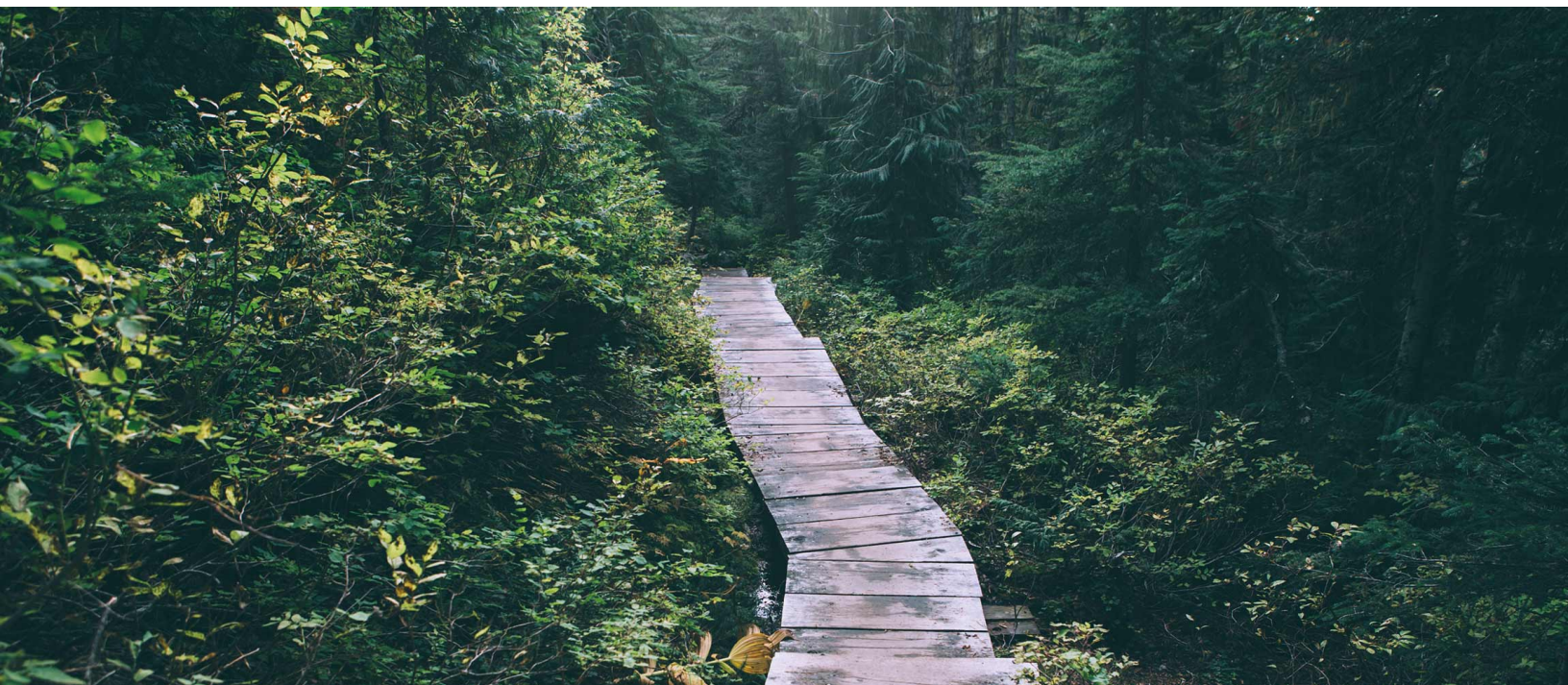
(<https://techcrunch.com/2017/05/02/orbital-insight-closes-50m-series-c-led-by-sequoia/>)

Intellectus Partners Co-invests with Sequoia in Orbital Insight



(<https://techcrunch.com/2017/05/02/orbital-insight-closes-50m-series-c-led-by-sequoia/>)

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[utm_source=maps_js&utm_medium=degraded&utm_campaign=keyless#api-key-and-billing-errors](https://developers.google.com/maps/documentation/javascript/error-messages?utm_source=maps_js&utm_medium=degraded&utm_campaign=keyless#api-key-and-billing-errors))

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