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WEALTH MANAGEMENT / LEADERSHIP / ATHENS

Building Wealth Around an International Life

Alpha Omega Private Wealth founder Lee Stevens on fragmented assets, disciplined investing and expanding an Athens boutique without losing the relationship at its centre.

IN CONVERSATION WITH LEE STEVENS | SEPTEMBER 18, 2026 | 8 MIN READ



INTERNATIONAL PERSPECTIVE, ANCHORED IN ATHENS.

ALPHA OMEGA INSIGHTS

ALPHA OMEGA

01

ATHENS

International wealth rarely fits neatly within one country.

A senior professional may live in Greece, have built wealth across different countries, maintain investments globally and hold assets with several institutions. For many expatriates and international professionals, the challenge is no longer gaining access to investment opportunities. It is bringing everything together under one clear, coordinated strategy.

That is the space occupied by Alpha Omega Private Wealth, an Athens-based boutique founded by British wealth manager Lee Stevens.

Stevens has spent more than 20 years in private wealth management and has been established in Greece for approximately 15 years. His experience across the UK and international markets has shaped a business designed around expatriates, internationally mobile professionals, business owners and families whose financial affairs extend beyond national borders.



THE FOUNDER

LEE STEVENS

FOUNDER & PRIVATE WEALTH
ADVISER

BASED

Athens, Greece

EXPERIENCE

20+ years in private
wealth

IN GREECE

Approximately 15 years

CLIENTS

Expatriates,
internationally mobile
professionals, business
owners and families

APPROACH

Personal, selective and
long term

01

A boutique built around the client

Clients may arrive with pensions, investments, cash and property distributed across several institutions and countries. Each holding may appear reasonable in isolation, but the combined position can lack a clear purpose, a consistent level of risk or sufficient liquidity for the family's next major commitment.

Alpha Omega deliberately operates differently from a large private bank or high-volume brokerage. The firm works with a select group of clients, allowing Stevens to remain personally involved in the construction, monitoring and continuing development of each strategy.

"If somebody entrusts you with their life savings, pension or family capital, the relationship cannot feel like a call centre," he says. "Clients should know who is looking after their money, understand why each investment is held and feel comfortable picking up the telephone when circumstances change."

Every relationship begins with a detailed understanding of the client: their family, existing assets, financial objectives, investment experience, liquidity requirements, risk profile and capacity for loss.

From there, Alpha Omega develops a coordinated strategy that may incorporate asset allocation, managed portfolios, equities, fixed income, structured investments and longer-term international planning. Assets remain with established external institutions and custodians, while the firm provides personal oversight and strategic direction.

THE INVESTMENT PRINCIPLE

Purpose before product. Structure before activity. A portfolio should be understandable, intentional and connected to the client's wider life.

"Most clients do not come to us with one tidy portfolio. The problem is that nobody is looking at the complete picture."

LEE STEVENS, FOUNDER

02

Advice when markets become difficult

The objective is not activity for activity's sake. Stevens says the role of an adviser is to preserve capital, pursue sensible long-term growth and make deliberate decisions when the balance between risk and opportunity genuinely changes.

That philosophy has become increasingly relevant as investors contend with inflation, changing interest rates, geopolitical disruption and sharp movements across equity, commodity and currency markets.

"When everything is rising, almost everybody feels like a successful investor. The real value of advice becomes apparent when markets are volatile."

LEE STEVENS, FOUNDER

Rather than relying on a single investment theme, Alpha Omega considers how assets behave together and whether the portfolio remains suitable for the client's wider circumstances. Risk, Stevens argues, cannot be reduced to a questionnaire or a numerical label.

"A client may be emotionally comfortable with volatility but still be unable to tolerate a large loss because school fees, retirement income or a property purchase are approaching," he says. "True suitability means understanding both their attitude to risk and their financial ability to absorb it."

ATTITUDE TO RISK	CAPACITY FOR LOSS	LIQUIDITY
How much movement can the client accept emotionally?	How much loss can the client's financial plan absorb?	What capital may be needed, and when?

03

An expanding international clientele

Alpha Omega's client base has increasingly developed through personal recommendations and professional relationships within Greece's international community. Athens is now home to multinational executives, entrepreneurs, returning diaspora and foreign residents whose accumulated wealth may sit in several countries.

The firm also works with clients whose careers or families take them beyond Greece. Their needs are not necessarily more complicated because they are wealthier; they are complicated because different institutions may each see only one part of their financial life.

"Growth means working with more of the right clients while protecting the personal service on which the business was built."

LEE STEVENS, FOUNDER

"International clients often find themselves dealing with several institutions, each responsible for only one part of their affairs," Stevens says. "What they want is somebody who understands the international nature of their lives and can bring clarity and accountability to the overall strategy."

This demand is creating opportunities for Alpha Omega, although Stevens says expansion will remain measured. Scale is not the objective in itself. The aim is to deepen the firm's international reach while retaining direct access, continuity and personal accountability.

FRAGMENTED ASSETS	ONE COORDINATED VIEW
Pensions, investments, cash and property can accumulate across countries and institutions.	The strategy brings purpose, risk, liquidity and reporting into one continuing conversation.

THE INTERVIEW

Five questions with Lee Stevens

01 What do clients most commonly misunderstand about wealth management?

1 That it is primarily about selecting investments. Investment selection matters, but it comes after understanding the client. The structure, level of risk, liquidity and purpose of the portfolio are every bit as important as the individual holdings.

02 What does being a boutique firm allow you to do?

2 It gives me the freedom to know my clients properly and respond personally. I am not handing the relationship from one department to another. When a client speaks to Alpha Omega, they speak directly to the person responsible for their strategy.

03 How do you approach investment risk?

3 Risk should be intentional. Every portfolio carries risk, but the client should understand where it sits, why it is being taken and what could happen in a difficult market. If an investment cannot be explained clearly, it probably should not be in the portfolio.

"Good advice is not about having the most products. It is about knowing why each decision belongs in the plan."

LEE STEVENS, FOUNDER

THE INTERVIEW

The international client, and what comes next

04

What are international clients looking for today?

Clarity, coordination and accessibility. They are often financially sophisticated, but their arrangements have become fragmented over time. They want one coherent view and an adviser who understands that their lives do not stop at one border.

05

What is the next stage for Alpha Omega?

To continue expanding our international client base carefully. We want to build long-term relationships with expatriates and international professionals around the world who value independent thinking, direct communication and disciplined wealth management. The firm will grow, but it will remain personal.

ALPHA OMEGA PRIVATE WEALTH

Begin a private conversation.

For internationally mobile individuals and families seeking direct access, personal accountability and one coordinated view of their wealth.

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