

# Fox, Penberthy & Dehn at Morgan Stanley



**Edward M. Penberthy, CFP®, CIMA®**  
Financial Advisor/Executive Director

**Albert A. Fox, CFP®, CIMA®**  
Financial Advisor/Executive Director

THE FINANCIAL ADVISORS AT FOX, PENBERTHY & DEHN want to listen to your financial needs and dreams – and then discuss the pressures that may keep you from a good night’s sleep.

“When people allow us into their lives financially, we’re able to take on their objectives to create a game plan that helps them achieve their goals,” says Albert Fox, a founding partner of the Mt. Laurel-based group at Morgan Stanley. “When they allow us to care, they can get great outcomes.”

He and his team of Financial Advisors are passionate about helping people at some of the most vulnerable times in their lives. Their successful practice focuses on advising clients through major life changes that can seem overwhelming in the moment, such as retiring, selling a business, losing a spouse or divorce.

“We absolutely love helping to

turn our clients’ financial inefficiencies and disorder into financial discipline and order to assist them in getting what they want out of life,” says Fox, a Moorestown resident. “We’re able to funnel through the barrage of information and strive to help eliminate the emotion in decision-making. We’ll help you develop a plan that’s realistic and easy to follow.”

Fox and Edward Penberthy, both Executive Directors at the firm, have been named to Forbes Magazine’s 2020 New Jersey list of Best-in-State Wealth Advisors for the third year in a row. The list is a selective compilation of financial advisors nationwide who have achieved high levels of success and stature in their



communities, Fox explains. The ranking was developed by Shook Research, an independent company that analyzes the data of thousands of financial advisors and conducts in-person interviews for Forbes, weighing in on factors including revenue trends, compliance records, industry experience and best practices.

“It’s a list that’s highly respected in the financial-service industry,” says Fox, noting that the typical size of household accounts they manage is \$3 - 20 million. “It doesn’t mean the services are foolproof, but the names on it are people that I’m proud to call colleagues. I wouldn’t hesitate to give it to a loved one who is looking for an advisor.”

Although only Fox and Penberthy are named, he believes that the entire team shares in the honor. They rely on the input of their 13-member team to provide the best investment strategies and advice that folds in all factors in clients’ lives.

While Fox works with a limited number of clients, he says members of the team continuously take on new clients at various stages in their lives.

“If someone wants or needs help, I don’t want them to feel bashful to call,” he says. “We have a full team of advisors who are amazing.”

Through Morgan Stanley, a leading global financial services firm, they have access to a wide range of services and solutions that cater to individuals, business owners and institutions.

Fox says gaining the trust of clients takes putting in the time to listen to their needs, putting them at ease discussing personal matters and asking the right questions to help sort out what’s important to them. The partners relish the challenge of coming up with a clear, straightforward action plan and explaining to their clients how following the plan will help them to achieve their goals.

“Part of our job as advisors is to help



**Albert A. Fox, CFP® , CIMA® , Edward M. Penberthy, CFP® , CIMA®  
and Joseph G. Dehn, Financial Advisor, CFP®**

you stay focused on the goal,” he says, “whether it’s retiring, selling your company, finding financial footing after the loss of a partner or a divorce, or putting children and grandchildren through college.”

**“We absolutely love helping to turn our clients’ financial inefficiencies and disorder into financial discipline and order to assist them in getting what they want out of life.”**

As a married father of 3, including college-bound twins, he knows that’s easier said than done. Fortunately, he and his team are practiced at helping clients stay the course when life throws curve balls and you have to adjust strategies.

Penberthy, a Medford resident, also has a history of practicing what he preaches as a father of three. A former soccer and

rugby standout, he’s a coach and fundraiser for his kids’ athletic teams as well as a founder of America’s Disaster Reaction Team, a nonprofit group dedicated to assisting areas impacted by natural disasters.

“Words are easy, but empty. Actions are everything, and when actions are repeated consistently, it creates a pattern that can lead to success,” says Fox, who serves on the board and executive committee of the Greater Philadelphia YMCA and steering committee for the Mt. Laurel Y. He’s also on the development committee for Moorestown Friends School, where his children attend.

“This has been a passion of mine since I was 18,” he adds, noting that an internship in the financial services business in college cemented his plans to help people with their financial lives.

“We strive for consistent successes and making a critical impact in the lives of our clients over the years,” Fox says. “And the more success we’ve had with our clients, the more we are determined to touch the lives of people we have not yet met. It’s what keeps us going.” ■

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