



**POWER**  
*players*

## The Pelican Bay Group Wealth Management Team

### FINANCIAL SERVICES

Whether your goals are aspirational or more modest, short-term or long, The Pelican Bay Group Wealth Management at Morgan Stanley in Boca Raton wants to make your goals a reality. They advise individuals, multigenerational families, financial advisors and institutional clients in strategizing, managing and then implementing well-considered financial solutions. Wealth management is planned to align with your goals, style, and, of course, your risk tolerance.

Their team offers a breadth of talent, experience and skills. Comprised of 17 Financial Advisors, assisted by 21 support personnel, the team is dynamic and features a multigenerational group of advisors.

"We're highly diverse, which helps set us apart," says Jeanine Delgadillo, a Senior Portfolio Management Director and Financial Advisor. The group meets regularly to stay ahead of an ever-changing landscape. "We have a collaborative approach and an extensive amount of intellectual capital in our team which better equips us to deal with different market environments and client situations."

Pelican Bay has a physical presence, not only in Boca Raton, but also across seven other branch locations nationwide. "It's all about building lasting relationships with clients and we believe nothing does that quite like in-person interaction," says Delgadillo, "It's tremendously rewarding to be on our clients' journey, walking with them every step of the way as they work toward achieving their life goals."

Pelican Bay educates clients, especially so in multigenerational families. "We focus clients on the benefits of both long-term goals

and the long-term solutions they require. Markets often don't give investors the instant gratification they sometimes seek. We teach the client first about risk rather than the returns of a portfolio," says Financial Advisor Richard DiMarzo, a 36-year veteran of the team. "We want the client to understand their portfolio. This helps them navigate the sometimes-difficult environments we will all face."

Some Pelican Bay clients have been so for more than 40 years. "When a Pelican Bay advisor retires, our client is engaged with many others on the team already and it's not difficult for the client to be able to choose their new advisor. They place their trust in our team," says DiMarzo.

#### THE PELICAN BAY GROUP WEALTH MANAGEMENT AT MORGAN STANLEY

4855 Technology Way, Ste. 600, Boca Raton, 561-393-1884,  
[advisor.morganstanley.com/the-pelican-bay-group](http://advisor.morganstanley.com/the-pelican-bay-group)

Morgan Stanley Smith Barney LLC Member SIPC.  
CRC 5671506 05/23

**FRONT ROW:** Heather Churchill Financial Advisor, Adrienne Lewallen Wealth Management Associate, Jeanine Delgadillo Financial Advisor, Jeanette Cox Financial Advisor, Richard DiMarzo Financial Advisor, Emily Bender Financial Advisor, Marcy Bonnet Financial Advisor  
**MIDDLE ROW:** Rebecca Bowman Team COO, Steve Miller Financial Advisor, Anthony Gallea Financial Advisor, Jennifer Hartmann Financial Advisor, Russell Smith Director Business Strategy, Sam McCormick Financial Advisor, Jeff Praino Financial Advisor  
**BACK ROW:** Chris Reynolds Financial Planning Analyst, Brandon Sumner Business Development Associate, Shelley Ford Financial Advisor, Ray Givens Financial Advisor, Ray Corney Financial Advisor, Dan Kapple Financial Advisor