Morgan Stanley

The AuYeung Wealth Management Group at Morgan Stanley

A commitment to help our clients succeed through investment and wealth management driven by a team culture guided by experience, integrity and service.

Customized Solutions Built Through Consensus. Guided and inspired by founder Frank AuYeung, a Managing Director, Family Wealth Director, Alternative Investments Director and Certified Financial Planner™, our team brings a powerful combination of experience and knowledge to each client situation. Frank, Senior Financial Advisors Jeremy Belnas and Jestin Chang, Financial Advisors John Zhong and Dante Collins, are supported by Client Relationship Manager Judy Fang, Portfolio Specialist Grace Ma and Wealth Management Associate Erika Tonges in a collaboration that draws on the complementary skills of each team member.

Trusting Relationships Across Multiple Generations. Our family-like culture and work ethic create a consistent experience for clients ranging from Silicon Valley executives to young professionals to international investors, and guides an integrated wealth management approach characterized by precise attention to detail.

Capabilities and Services

- Strategic Investment Management
- Portfolio Risk Management
- Financial Planning
- Retirement Plans including 401(k) SEP IRA, Traditional IRA, Roth IRA and Rollovers
- International Client Services
- Diagnostic Portfolio Analysis
- Concentrated Stock and Stock Option Plans
- Banking, Lending Solutions and Cash Management
- Estate and Business Succession Planning Strategies
- Annuities, Life and Long-Term Care Insurance
- Fixed Income and Municipal Bonds
- Philanthropy Management
- Bilingual-fluent in Mandarin and Cantonese

Family Office

Frank and the Morgan Stanley Family Office provide specialized knowledge, experience, tools, and networking events and create a customized, comprehensive plan to help achieve your unique vision to face complex multigenerational financial issues. Providing expanded capabilities such as Family Governess, Wealth Education, Philanthropy Management, Succession Planning and Single Family Office Advisory.

Front row: *Erika Tonges, Frank AuYeung, Dante Collins.*
Back row: *John Zhong, Jeremy Belnas, Judy Fang, Jestin Chang, Grace Ma.*

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WHY CHOOSE MORGAN STANLEY FAMILY WEALTH DIRECTOR

- Frank AuYeung is a Family Wealth Director (FWD).
- Less than 6% of Financial Advisors have obtained the Family Wealth Director title as of January 2023.
- Designated Family Wealth Directors must demonstrate professional knowledge and experience in a range of wealth management solutions including estate planning strategies, alternative investments, control and restricted securities, Employee Stock Purchase Plans (ESPP), lending, hedging and monetization, and business succession planning.

Manage Your Financial Life and Beyond

Reaching your goals often involves going beyond investment advice — we deliver a wide array of offerings and services centered on you and customized to help meet your needs, and provide access to specialists to help pursue specific goals.

A Client-Centered Approach

- Our priority is to help you navigate your financial life and beyond. We will act as your advocate on all matters, working closely with your attorney, accountant and Morgan Stanley specialists while applying our own experience in financial planning, trust, estate and investment management.
- We seek to establish life-long professional relationships, built on trust and satisfaction. We employ a disciplined process that follows a circular progression of discovery, advising on a plan, implementation and tracking. We help ensure the highest level of service and responsiveness by keeping flexible hours and providing timely communication on all questions and issues.
- When you are a client, you and your family can rely on the combined resources of our entire team as well as the vast capabilities of Morgan Stanley. Your investment portfolio is only the start as our goals-based planning approach addresses cash flow and liabilities solutions, estate and wealth transfer planning strategies, insurance, philanthropy and related services.

Our Team

Frank AuYeung, CFP®
Managing Director
Family Wealth Director
Alternative Investments Director
Sr. Portfolio Management Director
International Client Advisor
NMLS#: 1285240
CA Insurance License#: 0B46333

Jeremy Belnas
Vice President
Financial Planning Specialist
Portfolio Manager
Financial Advisor
NMLS#: 1268292
CA Insurance License#: 0E87322

Jestin Chang, CFP®
First Vice President
Sr. Portfolio Manager
Financial Advisor
NMLS#: 1282633
CA Insurance License#: 0E89680

Judy Fang
Vice President
Group Director
Business Development Associate
Client Relationship Manager
CA Insurance License#: 0D64409

Dante Collins, MBA
Financial Advisor
Financial Planner
NMLS#: 2106458
CA Insurance License#: 4116093

John Zhong, CFA®
Financial Advisor, International FAA
Portfolio Manager
NMLS#: 2371381
CA Insurance License#: 4255757

Grace Ma
Senior Registered Client Services Associate
Portfolio Associate
CA Insurance License#: 0F89549

Erika Tonges
Wealth Management Associate
Reinvestment Specialist
CA Insurance License#: 0I30821

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