Navigating the financial landscape has never been more challenging, even for those toward the upper end of the income scale. Generating a lifestyle-sustaining wealth management plan that will allow you to live as you wish today and in the future and ensure a legacy for your heirs is increasingly complicated in today’s uncertain economic and political environment.

The right team of advisors, knowledgeable and experienced in the complex needs of high-net-worth families and individuals, can make a world of difference. The Bromberg Group at Morgan Stanley is such a team.

“Most of our clients are officers, directors, 10 percent shareholders and other high-net-worth individuals,” says Jesse Bromberg, founding partner. “They are very good at what they do, but they typically don’t have the time or the inclination to micromanage their financial affairs. Instead, they trust us to do it for them.”

The San Francisco-based practice provides holistic wealth planning, with a focus on portfolio analysis and asset allocation, global macro-economic research, hedging, and succession and estate planning strategies. The six-member team is well positioned to leverage the vast resources of Morgan Stanley to achieve their clients’ most complex goals.

The practice is run like a multifaith office and provides highly customized, personal service to diverse clients with a variety of needs. “By reducing and coordinating the points of contact for retirement, education, family trust and legacy planning, we help simplify our clients’ complex lives,” Bromberg says.

Creating a Roadmap for Success

In Bromberg’s experience, highly successful people tend to have a very clear and precise plan – a “mission statement” – for success. Indeed, the Bromberg Group’s success, and that of its clients, owes much to the in-depth planning that underlies every wealth management relationship.

Each client receives a detailed written plan with specific recommendations for both meeting their basic goals and needs and fulfilling their wants and desires. The process begins with an in-depth analysis of every aspect of the client’s financial life, designed to significantly increase the success of the plan throughout the client’s career and in retirement.

“We help our clients take stock of their financial lives,” Bromberg explains. “We look at every single asset that represents our clients’ net worth balance sheet and cross-reference them against their time horizon, risk parameters, goals, objectives and income needs. At the end of the process, the client has a roadmap – a lifestyle-sustaining financial plan – for getting from where they are today to where they’re trying to go.”

Each plan is reviewed frequently and updated as necessary.

“Every client, every family, is unique,” Bromberg says, “and much of what we do depends on getting to know, on a granular level, what is going to make each one successful over the long term.” It is this commitment to the highest level of personalized, professional service that truly sets The Bromberg Group apart.

Holistic Wealth Planning

For Affluent Investors

The Bromberg Group at Morgan Stanley