Morgan Stanley

The California Generations Group at Morgan Stanley

Our clients are multigenerational. Our team is multigenerational. Your wealth can be multigenerational.

Can your financial plan withstand an uncertain future?

Will you be able to sustain your current lifestyle in retirement?

Are you prepared for the rising costs of long-term health care?

Can your wealth transfer seamlessly to future generations?

For over three decades, the California Generations Group has worked with clients to answer these critical questions and many more. Our enduring relationships—including with many second- and third-generation clients—are a testament to the financial success stories we've helped narrate.

Our Leadership:
Our Managing Director, Financial Advisor Ken Brozki, has spent four decades guiding successful families and individuals through the peaks and valleys of market cycles. Ken has established himself as a trusted advisor, helping clients navigate life's most significant transitions.

Our First Vice President, Financial Advisor Rances Sainz, is a CERTIFIED FINANCIAL PLANNER® professional upholding the industry's highest ethical standards. Through his commitment to ongoing research, he strives to ensure the team's strategies evolve with the changing landscape of wealth management.

Standing (left to right): Mercedes Guevara, Ken Brozki, Gabriela Garcia, Rances Sainz

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Our Core Beliefs

Client Loyalty First
Clear and Transparent Communication
Cost-Efficient and Tax-Aware Investment Strategies
Superior Service Is *The* Standard

"Someone's sitting in the shade today because someone planted a tree a long time ago."

— Warren Buffett

The Client Experience

1 | Discovering What Matters

We develop a deep understanding of your personal and financial situations. Understanding your "why" will help us develop the "how."

2 | Investing 101

Committing to a long-term financial plan is easier when you understand the investment world. In an industry that uses complexity to confuse, we use transparency to include.

3 | Crafting and Implementing Your Plan

If you don't know where you're going, any road can take you there. We create a road map to help you reach your truly desired destination.

4 | Monitoring Today, Preparing for Tomorrow

Life and markets can be unpredictable. We are constantly monitoring the markets so we can adjust as we navigate your financial path together.

Our Core Clientele

- Retirees
- Corporate Executives
- Medical Professionals
- Entertainment Industry Professionals
- Business Owners and Entrepreneurs

Our Core Services/Strategies

- Investment Management
- Financial Planning
- Retirement Income Planning
- Tax Management
- Trust and Estate Planning
- Insurance

LET'S GET STARTED

For a second opinion of your current investments or to create a financial plan, please call us at 818-382-5746 or email Rances.Sainz@morganstanley.com

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EQUAL HOUSING LENDER

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