Morgan Stanley

The Capitol Won Group at Morgan Stanley

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The Capitol Won Group at Morgan Stanley is a comprehensive wealth management practice based out of Sacramento, California. Our practice begins in the Northern California and extends nationwide. We have assembled a broad, experienced, and diversified team of professionals who are passionate about working with clients in all aspects of their financial well-being. Our team of professionals offer a diverse range of experience so that we may best address every financial situation you may encounter. Our thorough and complete process help individuals, families, and small businesses evaluate near-term concerns and plan long-term goals.

At The Capitol Won Group, we believe that your time is the most valuable asset and understand that each individual comes with their unique financial situation. As your advisors at Morgan Stanley, we will customize your portfolio to your financial plan with strategic asset allocation using our own quantitative, technical and fundamental analysis. We strive to make working toward your financial goals as simple and enjoyable as possible, saving you time over future financial concerns and letting you get back to doing things you love most.

About Us

Jeffrey C. Won

Financial Advisor

Executive Director

Senior Portfolio Management Director

Years at Morgan Stanley: 39

NMLS# 1270152

CA Ins. #0A37991

Phone: 916.552.2725

Jeffrey.Won@MorganStanley.com

Jeffrey C. Won began his financial career as a stockbroker in 1986 for Dean Witter after becoming unfulfilled as an engineer for McDonnell Douglas. Prior to his stockbroker title, Jeff proudly served the United States Marine Corps as a helicopter pilot flying throughout the United States while being stationed in Florida, Virginia, California, & Japan. After beginning his career in the financial industry, Jeff moved his career of flying to the weekends as a Reservist in order to focus on his financial practice.

Over the years, Jeff has spent countless hours crafting his hobby and often calls himself a student of the markets. He uses his military approach of flying similarly to constructing portfolios with discipline, checks and balances, and his own fundamental, quantitative, and technical analysis. He continues to customize portfolios client by client as he believes every client has different financial situations and does not believe in the typical cookie-cutter, one-shoe-fits-all investment strategy.

Even though Jeff never logs off from the global markets and financial news, he relishes serving his community through a variety of respectable charity organizations and Financial Training Seminar series. Unfortunately due to the 2020 pandemic, the in-person at the branch seminars came to an unexpected halt. Despite technology advances with video conference sessions, the participation and experience at the branch did not have the same effect and therefore, decided to stop the program indefinitely. The program which began in 1989 and ran through 2019 saw over 4,000 college students. Jeff also enjoys traveling, golfing, and spending quality time with his family.

Jason J. Won

Financial Advisor

Financial Planning Specialist

Associate Vice President

Years at Morgan Stanley: 13

NMLS #1487152

CA Ins. # 0L50817

Phone: 916.341.7610

Jason.Won@MorganStanley.com

Jason J. Won joined Morgan Stanley as an analyst for Graystone Consulting team at Morgan Stanley in 2012 while attending Drexel University. He would later transition to Jeff's business practice in 2013 as a Client Service Associate. In 2015, he began financial planning for the nine branches across the Sacramento/Reno complex as part of a Financial Advisor program. During his time working for the complex, Jason helped many advisors plan, solve, and execute financial strategies for their clients.

Upon completion of the complex role, Jason and Jeff formed the Capitol Won Group in 2017 to better serve their clients. Jason focuses on the team's financial planning, cash management, lending and servicing. Jason also utilizes his knowledge obtained from his Masters in Finance from Drexel to analyze and monitor risk across the client portfolios.

Jason relishes working alongside his dad and is often amazed by Jeff's longstanding history in the business. Jason also enjoys sports, wood working, photography, writing, and anything fast. When Jason's not at work, he is either working on a house project, watching his two young girls, or coaching basketball.

Josefina Arellano

Portfolio Associate

Years at Morgan Stanley: 21

CA Ins. #0F96219

Phone: 916.341.7608

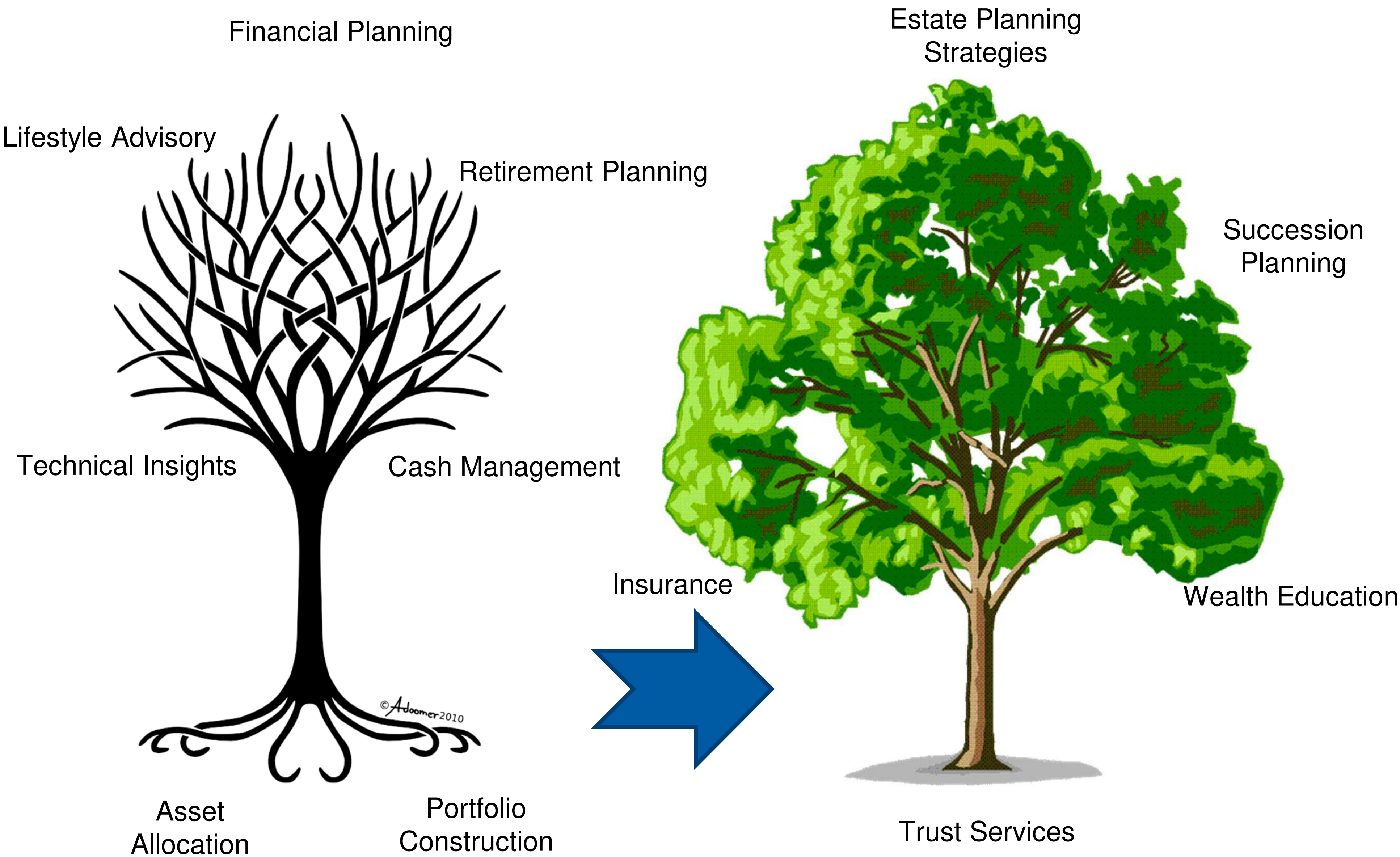
Josefina.Arellano@MorganStanley.com

For over 16 years, Josefina has continued exemplifying her work ethic and knowledge as a member of the Capitol Won Group. Her primary roles include operations, servicing, and cash management. Her outstanding work for the Capitol Won Group is not only recognized by their clients but also by the Complex. Her methods led her to serve as a CSA coach for six years for the complex and two years for the National Service Advisory Council. She is also licensed with series 7, 9, 10 , & 66. When Josefina isn't in the office, she enjoys family gatherings and traveling across throughout the world..

Causes & Charities

Over the years, our team has volunteered countless hours in the community supporting various charities and causes.   We have relish our philanthropic work with young children and sports within our community. Throughout our time in the last thirty years, we have served various roles within these well-known organizations in hope to create a healthier, efficient, and supportive community.

Our Family Wealth Overview



Capitol Won Group Portfolio Construction

One of our key differentiators among the financial industry is our investment strategy with portfolio construction. As the Portfolio Manager, our clients will own individual equities and fixed income instruments to help achieve their financial goals. We encourage anyone to ask us themselves what they own and why they own it. As a client of ours, we will always provide reasoning behind what you own and why you own it. We do not recommend packaged products. We believe each client financial need is unique-- the goal, time horizon, investment experience, risk tolerance, and liquidity need; therefore no investment should be cookie cutter or one-size-fits all. We will always put our clients interest first. And lastly, we are time and price sensitive; although we can buy and sell all at one time, there is no value as equities and bonds trade differently throughout the economic cycle.

Client Focus

Investments to help achieve their objectives through total return.
Income + Growth = Total Return

Disciplinary Approach

Fundamental and Quantitative Analysis answer the **What** Question. Technical Analysis answer the **When.**

Morgan Stanley

One of the top firms on the street. Access to all of its research, its platforms, and its capabilities.

Access

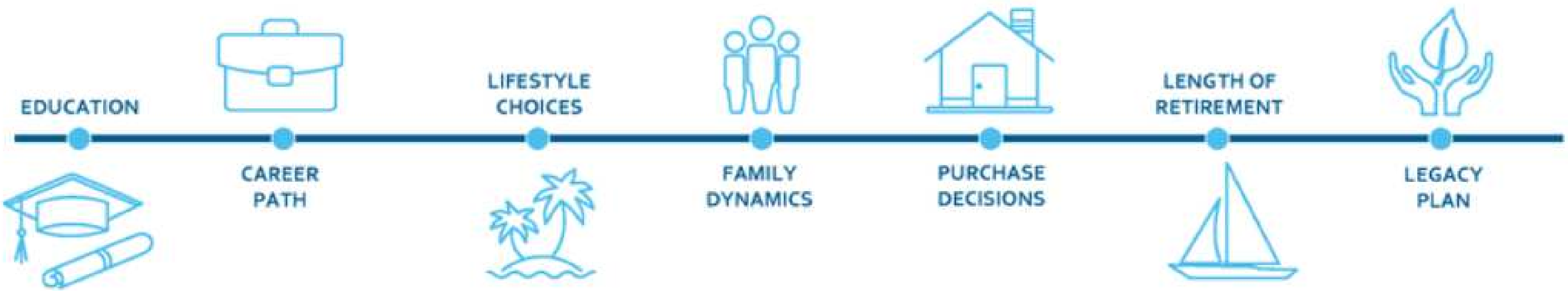
The Portfolio Manager and the Financial Advisor are the same role. We do not send money to mutual funds, money managers, or any investment product.

Comprehensive Management

We monitor our clients accounts, financial plans, and objective. Our due diligence is an **ongoing**, daily process that focuses on suitability, investments, risk, and tax harvesting strategies.

A Lifelong Process

Every individual will go through their own financial stage. We will be there every step of the way to manage the investments and monitor our clients day-to-day finances and life long assets, liabilities, and needs.



Early/Mid-Career

Goals
- Home purchase
- Have a child
- Protect family
- Plan for retirement
- Plan for children's college

Late Career

Goals
- Upgrade home
- Send children to college
- Assist aging parents
- Plan for future healthcare

Retired

Goals
- Maintain lifestyle and sufficient income
- Fund healthcare and unforeseen expenses
- Legacy Planning

Our Commitment To You

We provide exceptional experience designed to create clients for life.

The Capitol Won Group strives to:

- Understand your financial goals and objectives
- Provide financial planning tools to achieve your goals and objectives
- Deliver the best solutions for your short term and long term financial needs
- Develop and customize asset allocation
- Appropriate investments to fulfill your asset allocation
- Performance that meets your measure
- Maintain a comprehensive investment strategy
- Superior client services
- Portfolio reviews as needed

Our most important goal is to help you achieve your objectives, providing guidance that helps your wealth do more for you.

Working Together

Drawing on our own view of the markets, as well as Morgan Stanley's venerable global research, we are able to make informed recommendations and design a flexible investment management plan that is uniquely yours. Our philosophy is rooted in exceptional client service, reliability, education, and long-term relationships based on confidence.

Contact Us

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