Morgan Stanley

The CE Group at Morgan Stanley

Experience and World-Class Resources Deliver Results

Who We Are

The CE Group stands for **"Creative Energy",** which is the spirit that drives everything we do. We are an experienced team of wealth management professionals combining more than 50 years in industry experience. We deliver an abundance of resources to our clients that help navigate difficult discussions and complex situations.

We enthusiastically embrace the challenge of devising successful solutions, providing access to unique opportunities, and introducing our clients to highly regarded professionals across the firm. Our team's objective is to ensure that we are the first point of contact for all of our client's financial needs.

Who Are Our Clients

We seek to work with like-minded people who share our values and vision towards investment objectives. Situations for which we provide guidance include:

- **High net worth individuals** who have accumulated considerable capital and are seeking to preserve and grow their assets through prudent investments
- **Wealthy families** hoping to leave a meaningful legacy while avoiding the pitfalls of unforeseen liability or family conflict
- **Business owners** anticipating and adapting to liquidity events
- **Investment professionals** looking to have their own personal assets managed by an experienced, full-service wealth management team

We focus on the quality of our relationships and purposely limit our practice to clients we feel can most benefit from our experience. Our new client relationships are most often referred by existing clients, friends and family who appreciate the value and high level of service we provide.

Left to right: *W.Chip Eggers, Sofia Bousseba, Rebekah Smith*

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Visit our website at:
https://advisor.morganstanley.com/the-ce-group

"To give anything less than your best is to sacrifice the gift"

-Steve Prefontaine

Pursuing Excellence

We are committed to the highest standards of service and believe that integrity is the most important element involved in building trust.

Our team operates like a family office, helping our clients allocate assets to meet financial goals and providing solutions that go beyond investment guidance.

To illustrate a couple scenarios we support:

- **Fostering Family Unity on Financial Decisions** Through group meetings and individual consultations, we advise families how to achieve consensus on financial matters. This often takes the form of outlining family mission statements, setting up philanthropic vehicles, managing trust assets, reviewing trusts and estate plans, assembling tax-impact strategies, and educating the next generation about investments.
- **Preparing for Liquidity Events** Liquidity events like selling a business or taking it public mark a significant life achievement. The windfall produced by such transactions can lead to financial security but could also be eroded by taxation and inadequate planning. We provide guidance on strategies for minimizing taxation and deploying capital for diversified positioning.

Our Process

Dependability, accountability, and reliability are the foundations on which we built our business. The CE Group has developed a disciplined and systematic framework for working with our clients which includes:

ASKING THE RIGHT QUESTIONS

We are interested in hearing about the objectives that provide context to the accumulation of personal wealth.

Our discussions encompass both sides of the balance sheet and seek to address every aspect of financial life.

The information we gather can help us determine the appropriate strategies for our unique client situations.

PUTTING WEALTH TO WORK

Our responsibility is to provide solutions for our clients to maintain agility and diversification in ever-changing market environments. We work closely on many different strategies for asset allocation, including vetting and evaluating an extensive selection of third party and proprietary investment managers.

Our thorough research examines not only returns, but performance in down markets, tenure of portfolio managers and style adherence. In addition to traditional investments, the customized asset allocation we develop for our clients may contain alternative investments such as private equity, private credit, real estate funds, secondary funds and continuation funds designed to provide diversification and negative correlation to traditional markets.

SEEKING SOLUTIONS

We work with in-house experts and third parties such as private bankers, financial planning directors, accountants, business managers ,attorneys, estate planners and other consultants to provide solutions that go beyond investment needs addressing issues such as:

- Managing liabilities and utilizing debt strategically
- Day-to-day expense solutions, budgeting, liquidity, and cash management needs
- Identifying sources of potentially unnecessary or excessive taxation that may be eroding wealth
- Formulating strategies for supporting the philanthropic organizations important to you, while reducing tax liability and simplifying your financial life

Our Areas of Focus Include

- Asset Management
- Alternative Investments
- Structured Products
- Cash Management
- Lending Products
- Trust Services
- Estate Planning Strategies
- Philanthropic Management
- Financial Planning
- Education Funding
- Retirement Planning
- Life Insurance
- Annuities
- Family Office Resources

Meet The CE Group

W. Chip Eggers
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W. Chip Eggers has over 30 years of wealth management experience and a track record for helping clients navigate the multifaceted challenges and complexities of significant wealth. He offers strategies to clients on portfolio composition and facilitates solutions for financial planning, generational wealth transfer, philanthropy, estate planning and long-term investing principles.

Chip began his wealth management career at Neuberger Berman, went on to Credit Suisse and then assumed similar roles at JP Morgan. He joined Morgan Stanley as a Managing Director in early 2022.

He attended the University of Southern California, attaining an undergraduate degree in Business Administration and an MBA in Finance.

Chip is also co-founder of Westcoast Sports Associates, a youth charity established to benefit economically disadvantaged kids seeking to learn life lessons through participation in sports.

Rebekah A. Smith
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Rebekah A. Smith is a Financial Advisor with 12+ years of experience in the wealth management industry. Since joining the firm, she has held multiple roles and developed industry experience across many disciplines, including investment management, wealth resources and talent development. Prior to joining The CE Group, she was a key member of Morgan Stanley's leadership team in the Beverly Hills complex.

Rebekah operates as The CE Group's generalist and also functions as team manager. She has developed an integrated approach to accessing the broad spectrum of the Firm's resources in order to furnish high-quality investment solutions and supplementary financial services. She prizes efficiency, attention to detail and is dedicated to ensuring a rewarding experience for our clients.

Rebekah is from Sanibel Island, Florida and attended Ave Maria University. She is involved with several charities including Heal The Bay and Mercy For Animals. She enjoys horseback riding, playing piano and reading in her spare time.

Sofia Bousseba
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Sofia Bousseba is a Financial Planning Specialist at Morgan Stanley. She manages client service for The CE Group, with a focus on planning strategies. Before moving to Los Angeles, she worked in New York City for JP Morgan Chase Bank as a banker, and AXA advisors as a Financial Advisor.

Sofia earned her Bachelors degree in Computer Science at Hunter College, and an MBA in Finance from Keller Graduate School of Management. In her free time she enjoys spending time with family and friends, cycling, Pilates and traveling. Having grown up in Casablanca, Morocco, Sofia is also fluent in French.

Substantial wealth is often coupled with significant complexities...

Families are not always on the same page regarding how assets should be allocated and passed on to the next generation or gifted to charitable organizations.

Parents and grandparents may be concerned that their descendants do not understand investing or underestimate the responsibilities that accompany wealth.

Individuals starting out or embarking on significant life-changes are often unsure of how to manage money and make it work for them and their families.

Having the right wealth advisory team in place can be crucial in navigating these and other challenging situations.

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