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Practitioner Profile: An Interview with Andrea Vining

Andrea Vining
Morgan Stanley

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Practitioner Profile

An Interview with Andrea Vining, B.A.

Andrea Vining is a Financial Advisor at Morgan Stanley in Pasadena, California who was named to the Firm's Pacesetter's Club in 2015, a global recognition program for Financial Advisors who, within their first five years, demonstrate the highest professional standards and first class client service. She holds a Bachelor of Arts degree in Literature from the University of California at Santa Cruz and her interest in the arts is personal and life-long. She studied Jewelry Design & Fabrication at the Gemological Institute of America in Carlsbad, CA and is also a certified bench jeweler. She and her colleagues are passionate about leveraging their network to help others achieve their financial, philanthropic, and life goals.



Q. Define what you do professionally.

A. Being able to educate individual clients, and reduce the often intimidating world of wealth management and investments strategies is a pleasure. I believe all my clients should have a clear understanding of what their portfolio contains, in plain English, so we can comfortably meet their retirement, college, or other goals. I also assist clients in financial transition, be it divorce, inheritance, or separation from a company.

Q. What activities encompass your professional responsibilities?

A. Retirees, women, same sex couples, and attorneys are various groups for whom I have helped create custom-designed wealth and planning solutions. Liability management, in which my clients do not have to liquidate their portfolios to pay off their debts, is another area of focus. Estate planning strategy

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discussions also open up the conversation to include life insurance (CA Insurance Lic.# 0G15937), loans, title issues, retirement plan beneficiary designations, and more.

On the retirement side, our team can help design a 401(k) plan or Defined Benefit plan. I enjoy working in a collaborative style with our clients' CPAs, attorneys, and other trusted advisors.

Q. How long have you been engaged in your professional activity?

A. I have been involved in the Financial Services industry for over 20 years.

Q. What led you to your professional calling?

A. My mother was my inspiration, having been one of the first women traders admitted to the floor of the Pacific Coast Stock Exchange.



Q. How are you compensated?

A. I am paid primarily on a fee-based schedule, though I can be paid by transaction as well.

Q. Do you work alone or do you have a team? Please explain.

A. I have a team. We are called The Rose City Group at Morgan Stanley.

Q. What theoretical framework guides your work when dealing with clients and/or conducting research?

A. Every client is unique and will bring with them their own set of values and feelings as they relate to money and investing. It is very important to listen and take the time to understand each client's distinct experience.

Q. What needs to happen so that 10 years from now we can say that financial therapy is a respected field of study?

A. Understanding and respecting the role emotional factors have when making financial decisions.

Q. What benefits can the Financial Therapy Association provide to others doing work that is similar to your professional activities?

A. I believe further education for financial advisors on how therapeutic skills can be integrated into client meetings, and thus improve the overall wealth management experience, would be beneficial.

Q. If others are interested in finding out more about you personally and professionally, where can they obtain this information?

A. <http://www.morganstanleyfa.com/andrea.vining/>