

Kit Mac Nee, CFP®, CRPC®, AEP®

Los Angeles, California

current executive committee

Availability:

Programs up to 2 hours

Virtual or In-Person Programs



Topics:

- **Behavioral Finance: Is it rational or irrational**
- **Myths about Social Security: Understanding Benefits**
- **Protecting Yourself from Identity Theft**
- **Estate Planning for different cultures: What are the barriers**
- **The Myths of 529s: Transfer Millions out of an Estate?;**
- **Socially Responsible Investing: Do my Investments Match my Values?**
- **Intelligent Withdrawals: Tax efficiency and Maximizing the Income you Keep**
- **Maximizing the Benefits of Charitable Giving Through Assets vs. Income;**
- **Impact of Long Term Care and Health Expenses on Legacy Preservation**
- **Strategies to Preserve the Family Legacy: How do you talk with your family about money and values?**

We all need accurate information and dependable relationships. That's true no matter what we're looking for, and it's especially true when it comes to financial planning. Kit's clients trust her for two main reasons: They know she cares and they value her experience. This personal-professional combination gives her clients more confidence. We all seek out experts for important parts of our life. It's about more than just money. Her expertise is about conditioning your financial life for strength, health, and endurance.

Kit, a financial services veteran, joined Morgan Stanley as a Financial Advisor in Pasadena, CA in 2013 and is currently with the Envision Legacy Group in Beverly Hills, CA. Prior to joining Morgan Stanley, she was with Merrill Lynch Wealth Management for nearly nine years. On her way to becoming a CERTIFIED FINANCIAL PLANNER™, Kit served a community foundation in Southern California as its Director of Gift Planning. While at the community foundation she worked with donors and local charitable organizations to gain philanthropic assets that would provide a legacy of financial resources. Today, she uses her financial-planning proficiency to serve as a volunteer, board member, and consultant to guide families and charities toward more secure financial futures.

Kit raised three children, all now grown and leading fulfilling lives in from coast to coast. She lives in Los Angeles and travels throughout Southern California and the U.S. to support clients as well as the community groups she works with. Her volunteer work continues as a 2024 President for NAEPC and as a board member of St. Barnabas Senior Services. Kit is a graduate of the University of Minnesota, Carlson School of Management, earned the Certified Specialist in Planned Giving® from California State University Long Beach, American Institute of Philanthropy in 2001, and became a CERTIFIED FINANCIAL PLANNER™ and Accredited Estate Planner® designee in 2013.

Recent or Upcoming Speeches through the No-charge Speaker Program

Amarillo Area EPC (TX); Central Pennsylvania EPC (PA); Central Arizona EPC (AZ); Central Texas EPC (TX); Colorado West EPC (CO); Corpus Christi EPC (TX); Eastern Illinois EPC (IL); EPC of Central Illiana, Inc. (IN); EPC of Central New York (NY); EPC of Chattanooga (TN); EPC of Diablo Valley (CA); EPC of Rochester (NY); EPC of Southeast Denver (CO); EPC of Tulare-Kings Counties (CA); EPC of Westchester County (NY); Eugene EPC (OR); Fairbanks EPC (AK); Howard County EPC (MD); Magic Valley EPC (ID); Mid-Missouri EPC (MO); Montgomery County EPC (PA); Northcentral Pennsylvania EPC (PA); Northeastern Michigan EPC (MI); Pinellas County EPC (FL); Rochester EPC (MN); San Fernando Valley EPC (CA); Santa Barbara EPC (CA); Sioux Falls EPC (SD)