

PHIL MARCHESE

Board Member, Initiative for Family Business and Entrepreneurship



Phil Marchese is a founding partner of the Heritage Wealth Management Group at Morgan Stanley in Philadelphia, Pennsylvania. The team provides wealth management services to entrepreneurs, company executives, and their families. They evaluate and implement strategies and solutions for these clients as their businesses evolve from start-up, through growth phases, capital raises, and in preparation for successful ownership succession, liquidity events, and sale transactions. The team shares a mutual belief in “doing unto others as you would have others do unto you” and operates with three core tenets: capital should be managed prudently, with integrity, and transparently. Phil has earned his Certified Financial Planner Designation and is a Chartered Financial Analyst Charterholder. He is also a Family Wealth Director at Morgan Stanley, with access to special access to a variety of services such as: Family Governance and Dynamics; Family dynamics and philanthropy; Philanthropic Services; Lifestyle Advisory; Wealth transfer.

The team believes in comprehensive wealth management encompassing the entire range of clients' assets and liabilities in concert with their lifestyle and legacy goals. This requires a knowledge and awareness of clients' potential opportunities to invest in operating businesses, direct real estate holdings, and private equity co-investment so that their publicly-traded investments fit within their overall risk tolerance and liquidity needs. It also necessitates a close working relationship with clients' legal and accounting teams to facilitate an efficient management of estate planning, risk management, and tax strategies.

Phil received a B.A. from Saint Joseph's University and graduated cum laude while participating on Saint Joseph's lacrosse team and earning academic all-conference honors. He has also attended the Strategic Management Executive Programs at Harvard University's Kennedy School of Government.

Phil serves on the board of Freire Charter School, where he is board treasurer. In addition he is an active member of the Saint Joseph's University Family Business and Entrepreneurship Advisory Committee. In the past, he has served on the Elwyn Business Advisory Council, the board of WYBE public television, the Union League Committee on Admissions, and the Stewards' Alliance of the Archdiocese of Philadelphia.

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