

Mary “Kit” Mac Nee, CFP®, CRPC®, CSPG®, AEP®
Financial Advisor
Los Angeles, California

My goal is to assist my clients in managing their finances so they can focus on living lives filled with joy from her office in Los Angeles, CA. She has been in financial services for nearly 20 years. Prior to joining Morgan Stanley, Kit was with Merrill Lynch Wealth Management for 9 years.

On her way to becoming a CERTIFIED FINANCIAL PLANNER™, Kit served at the Inland Empire Community Foundation as its Director of Gift Planning. She worked with donors, professional advisors and local charitable organizations to build philanthropic assets that would provide a legacy of financial resources to the Inland Empire.

Kit raised three children, all now grown and leading fulfilling lives in different parts of the United States. She loves traveling to visit my family, including trips to Detroit, my original hometown and around the world. She lives in Santa Monica, California and travels throughout the U.S. for public speaking engagements, to support clients and the community organizations she works with. Her volunteer work continues as Treasurer for the National Association of Estate Planners and Councils and board member of St. Barnabas Senior Services, Los Angeles as well as Social Justice Partners Los Angeles. 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, became a CERTIFIED FINANCIAL PLANNER™ and Accredited Estate Planner® in 2013.