

Robert A. Brown
Registered Client Service Associate | Practice Manager
Dalton & Associates
A private wealth advisory practice of Ameriprise Financial Services Inc.



Professional Background

- Ameriprise Financial | Registered Client Service Associate & Practice Manager 2015-Current
- Morgan Stanley Wealth Management | Registered Client Service Associate 2014-2015
- Morgan Stanley Wealth Management | Co-Chair Woodland Hills Complex Diversity & Inclusion Council 2014-2015
- Morgan Stanley | Senior Service Associate | Operations 2008-2014

Professional Licenses

- Series 7 | General Securities Representative Exam
- Series 63 | Uniform Securities Agent State Law Exam
- Series 65 | Uniform Registered Investment Adviser Law Exam

Affiliations & Community Participation

- Co-Founder & Chief Marketing Officer | The DJ|JD Foundation
- Volunteer | Agape International Spiritual Center
- Volunteer | Operation Gratitude

Personal

I live a passion driven life. My wife and my son are my main source of inspiration. Aside from family time, work and giving back to the community I enjoy both watching and playing sports, weekly trips to the beach for meditative check-ins and listening to music. I am also a published poet and I often participate in motivational speaking/life coaching.

My daily focus is to do what I can to make life a little easier for others. I implement the same focus and energy on our practice.