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WOMEN CHANGING THE WORLD

pg. 35

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For 30 years and counting, **Rachel R. Cohen of CapQuest Group at Morgan Stanley** has been guiding clients toward their financial goals, uplifting her colleagues, and giving back to the community.

page 48

PARTNER PROFILE

by **Bill Donahue**

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>
> —Rachel R. Cohen, CapQuest Group at Morgan Stanley

On a Quest to Help Others SUCCEED

FOR 30 YEARS AND COUNTING, **RACHEL R. COHEN OF CAPQUEST GROUP AT MORGAN STANLEY** HAS BEEN GUIDING CLIENTS TOWARD THEIR FINANCIAL GOALS, UPLIFTING HER COLLEAGUES, AND GIVING BACK TO THE COMMUNITY.

Rachel R. Cohen, CFP®, CRPC®, CDFA™, grew up with an intense desire to make a difference in the world. In college she sharpened her knowledge by studying business and finance, and she spent the ensuing years honing her experience as a financial advisor and a leader. She has many job titles—Executive Director, Wealth Advisor, Senior Portfolio Management Director, Alternative Investments Director, Lending Specialist, and Senior Investment Management Consultant—but she sees herself in simpler terms: a skilled and passionate problem solver who just wants to help other people.

"I'm in a position to help people every day," says Cohen, a financial advisor with Morgan Stanley Wealth Management in West Conshohocken. "You can't predict the markets, but you can always treat people with compassion and respect. Clients tell me, 'I feel like you care about me,' or 'I always know you're there for me,' or 'I can tell you love what you do.' That's the kind of feedback that tells me I'm doing something right.

"When I work with a client, my goal is to become a resource for them," she continues. "Sometimes they're not sure of their goals but they know they need help moving forward, especially after a big change in their lives, like a divorce, death, the sale of a business, or some other significant transition. I get to know them as people first and then help them succeed. You have to be a resource consistently, and I really enjoy being in that position."

One of her proudest achievements: creating and launching CapQuest Group at Morgan Stanley in 2024. In the process, she expanded her established team—Wealth Management Associate Casey Dearth, Client Service Associate Tiffany Bechtel, Senior Registered Client Associate Melissa Shoupe, and Registered Client Service Associates Virginia Rockey and Serena Mao—with two key additions: Senior Vice President/Financial Advisor Philip C. Grossman, CFP®; and First Vice President/Financial Advisor Todd M. Roth, CFP®.

Cohen believes the group is well positioned to provide customized financial advice and exceptional service to clients, which include high-net-worth individuals, business owners, and corporate executives. She and her two partners have 80 years of combined experience* in the industry. Whether clients need guidance on how to achieve specific lifestyle goals, executive compensation, selling a business, estate planning strategies, tax management, philanthropy, or some other need pertaining to their financial futures, the team at CapQuest Group at Morgan Stanley is ready to serve.

"We're here to help clients who are on these quests, which are more meaningful than goals," Cohen says. "More than hitting a specific number or target, quests are about how clients want their wealth to work for them. Although quests can vary from client to client, our mission always remains the same: to help ensure that our clients are in a good position to get where they want to be."

A Responsibility to Help

Cohen earned her M.B.A. in finance from Temple University's Fox School of Business. Her many honors and awards include *Forbes* Best-In-State Wealth Advisor, among others. She has spent more than 30 years educating and advising clients, but strives to make a difference in the lives of nonclients, too—namely, her colleagues and members of the community, including through her involvement in organizations that uplift women. In addition to taking a leadership role in the Forum of Executive Women, she helped launch the Philadelphia Complex Women and Wealth Chapter, and has served on the planning committee for the Morgan Stanley Women's Summit. She also serves as a council member for Women in Wealth LIFT (Ladies in Finance Together), an advocacy and business development network of Morgan Stanley women dedicated to supporting peers to achieve business success and realize meaningful connections with their clients.

"I see it as my responsibility to help in any way I can," she says. "When someone comes to me with an issue or a question that keeps them up at night, I'm going to do everything in my power to solve the issue in front of me. If there's an issue that falls outside of my area of experience, I have built a network of people around the country I can turn to, including other advisors."

A lifelong learner, Cohen continually finds new ways to challenge herself, step outside her comfort zone, and build on her considerable expertise. She has acquired several prestigious designations and certifications to help her better serve clients—CERTIFIED FINANCIAL PLANNER®, Chartered Retirement Planning Counselor, and Certified Divorce Financial Analyst®—and is working toward another professional credential that would make her a specialist in helping business owners prepare to step away from what they have built, either through a sale, succession, or some other transaction.

In turn, Cohen sees it as her responsibility to help each member of her team to embrace continual self-improvement.

"This is a high-pressure line of work, but it's very rewarding because of the difference you can make in people's lives," she adds. "That includes my team, and I want to see them develop as people and professionals by taking on more responsibility and moving forward in their lives. If our team members are happy and successful, that's going to make a big difference for our clients, too."

Despite the long hours and intense nature of her position, Cohen always prioritizes time with her family: her husband, Kipp, an attorney at Blank Rome LLP who specializes in mergers and acquisitions; and their two sons, 25-year-old Brandon and 23-year-old Ryan, both of whom work in finance. She's incredibly grateful for the support of her family over the years, adding, "I couldn't have done any of this without them."

Cohen foresees her team (and herself) becoming increasingly valuable for their growing list of clients, all while maintaining the delicate balance between their professional and private lives. She follows the same advice she tends to give her clients: work hard and save for the future, but also spend time on yourself and your family.

"When I advise my clients, we talk about investments, retirement, and other financial issues, but that's only part of the equation," she says. "We also talk about doing things that make them happy and having a good understanding of what's important to a family's future. To me, the two go hand in hand." ■

Cohen portraits by Jody Robinson; group photo courtesy of CapQuest Group at Morgan Stanley

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