Anita A. Brown CFA

Senior Managing Director

Anita joined L&S in 2018 as a Senior Managing Director. Having been in the industry for more than 40 years, Anita’s experience with various economic cycles has allowed her to apply a long-term perspective to wealth management. Anita's focus is managing individual clients’ wealth, including IRA’s, UTMA’s, charitable trusts and foundations. She makes it a priority to discuss with clients their long and short term financial goals and circumstances to develop dynamic guidelines for investment and estate planning—all while working closely with the clients’ CPAs and attorneys to ensure such integrated goals are met.

Anita’s long and diverse history in the securities industry began in municipal bond underwriting and equity analysis in the mid-1960s. Later, Anita added fixed income analysis and by the late 1970s, Anita began to manage trust portfolios. Anita’s trust experience led to a focus on asset-based management and in 1998, Anita joined CIBC Oppenheimer, followed by eight years at Morgan Stanley. Prior to L&S, Anita worked at Beverly Hills Wealth Management, a Beverly Hills Registered Investment Advisor (RIA).

Anita holds a Bachelor of Science in Marketing and Economics from the University of Arizona and a Master of Finance from the University of Southern California. She is Series 63/65 licensed and holds the Chartered Financial Analyst (CFA) designation.