Robert Roman

CEO OF MGO PRIVATE WEALTH

Robert is the consummate behind the scenes private wealth manager. He maintains a minimal public profile while orchestrating pioneering wealth planning strategies and investment portfolios for a premier roster of CEOs and founders, high-net-worth individuals and families, and top-earners in entertainment, sports and media.

Robert's approach is built on the knowledge that a client's financial life is more than the performance of stocks, bonds, and other investments. It is a complex web of competing ambitions, demands, and necessities that flow through business, personal and advisor relationships. At the very center are the unique goals and legacy-building aspirations of each individual client. Robert takes a holistic approach that addresses these diverse interests, identifies synergies, and tightens inefficiencies so no capital is left on the table. This truly concierge methodology is built on trusting relationships and is more time- and resource-intensive than the procedures of typical wealth management firms, but Robert feels that his clients' satisfaction, and the objective performance of their investment portfolios, speak for efficacy of his approach.

Robert belongs to a unique cadre of wealth planning professionals in that he has over two decades of financial experience, yet he maintains a youthful vigor that fuels the on-going pursuit of new tools, research, and alternative investments. Robert first entered the financial sector at the age of 20, working with two of the largest global wealth management firms. He gained first-hand perspective working at one firm's headquarters on Wall Street, collaborating with corner office leadership while servicing high-net-worth individuals and corporations. It was during this time that Robert formulated his own wealth management approach. He adopted and optimized methods that worked, while transforming and improving on what didn't work. After a decade of success, Robert ultimately took his own path, founding Legacy Private Client Group at the age of 31, and leading it to become one of the fastest growing wealth management firms in California.

In 2016, Legacy Private Client Group partnered with professional services firm MGO to create MGO Wealth Advisors. Supported by the tools and resources of a national CPA and advisory firm, Robert further evolved his approach by infusing it with expert-level tax analyses, industry insights, and exclusive investment opportunities. In 2020, MGO Wealth Advisors combined with the Wealth Management LAB, led by Louis Barajas, and rebranded as MGO Private Wealth, a powerhouse wealth management firm dedicated to one-on-one service, dynamic investment strategies, and exemplary portfolio performance.

While Robert prefers a low profile, his work has inevitably gained the attention of the broader financial planning community. Recently, Harvard Business School commissioned a study of Robert's approach to private equity investments with one of his high-profile entertainment industry clients. The resultant research is currently being translated into course materials that will be studied at prestigious campuses in 2021 and beyond.

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