

Celebrating over 30 years in business!

Our mission is to earn your trust and confidence by implementing strategies to increase income, minimize income and estate taxes, and increase your overall net worth... with a special attention to personal service.



Planned Asset Management is an independent firm based in Calabasas, California, offering comprehensive financial planning services to individuals, families, professionals, and small business owners. We serve clients throughout the greater Los Angeles area, as well as across the country, focusing on wealth accumulation, preservation, and distribution.

We pride ourselves on experience, professionalism and commitment to our clients. Working together as a team, our goal is to build trusted relationships with clients and develop strategies aimed at increasing a client's income, minimizing income and estate taxes, and increasing their overall net worth, all with special attention paid to personal service.

Prepare for the road ahead with the help from your own financial concierge with Planned Asset Management. Contact us today for a no-cost, no-obligation first meeting.

Welcome to our Video Section!

Check out Morrie discussing what we can do to help you!

MWR CFP Intro



Reducing Market Risk



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