Mt. Lowe Group

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300 North Lake Avenue, Suite 1010
Pasadena, CA 91101

Michael O. Healy, AWM
Senior Vice President – Financial Advisor, Private Client Group
Senior Portfolio Manager – Portfolio Focus
(626) 204-2120
michael.healy@rbc.com

Jeffrey Scofield
Senior Vice President – Branch Director
(626) 204-2115
jeffrey.scofield@rbc.com

Deanna M. Clark
Senior Investment Associate
(626) 204-2125
deanna.clark@rbc.com

Keeping you on track to success

We recognize the financial markets can be very complex and intimidating. To add clarity, we work closely with you to offer comprehensive solutions given your individual situation. Client comfort is paramount, so we consistently make ourselves available to address any inquiries you may have, and our goal is to be your primary advisor. To the extent you allow us, we work collaboratively with your other hired professionals to provide an all-inclusive approach. We are committed to educating our clients so they may become better investors. While we appreciate that many clients delegate investment responsibility to us, our experience suggests there is a strong correlation between investor education and investment success. We embrace the opportunity to share our resources and professional experience with those clients willing to engage.

Approach to wealth management

We tend not to be influenced by current fads or the financial media. Instead, we offer a disciplined approach toward formulating and managing an investment plan custom to your situation. We pride ourselves on superior service and operating a client-centric, high quality practice based upon a high degree of integrity and hard work. The vast majority of our new relationships are introduced to us by our existing clientele and we appreciate the confidence our clients place in us.

Our process

To help create good chemistry between us, an important first step is getting to know each other. Achieving financial security can be a challenging process and it's important our clients are comfortable with our approach and share a similar long-term commitment to success. After learning about your goals and aspirations, we also discuss your concerns and any potential apprehension you may have. We do not subscribe to a "one-size-fits-all" philosophy and our personalized approach validates this. After a thorough study of your current resources and corresponding objectives, we model out your financial future to assess if they are properly aligned. We then recommend and implement an investment approach well-suited to your individual circumstance. As the process continues, we formulate, position and manage your portfolio according to your stated objective. If a situation arises that warrants it, we bring in third party professionals to help provide comprehensive coverage. We recognize that a prudent investment program is dynamic and ongoing. Consequently, we put a big premium on transparent reporting and fee structure, as well as open, two-way communication. All client contact is strictly confidential and we take our professional responsibility very seriously.

RBC Wealth Management

Michael O. Healy, AWM

Senior Vice President – Financial Advisor, Private Client Group
Senior Portfolio Manager – Portfolio Focus

(626) 204-2120 | michael.healy@rbc.com

Michael began his career in the financial services industry in 1980. He has worked directly with clients throughout and has also held various management responsibilities. He currently devotes full time to his clientele. Michael holds the designation of Senior Portfolio Manager in the RBC Portfolio Focus Program and he sat on the RBC Portfolio Focus Advisory Council for more than ten years. He is perpetually a member of RBC's President's or Chairman's Council. In 2015, Michael completed the Accredited Wealth Manager (AWM) program, a professional designation specifically designed by RBC Wealth Management. He serves as a member of the New York Stock Exchange Hearing Board and has passed all required securities and insurance exams.

A graduate of University of Southern California, Michael holds a Bachelor of Science degree in business administration. He is very philanthropic, having actively participated on numerous nonprofit boards. Michael served as president of the boards of Chandler School, Cancer Support Community Pasadena and the Altadena Town & Country Club. He currently serves as treasurer of the Pasadena Breakfast Forum and is a member of the Twilight Club of Pasadena. Michael enjoys a variety of outdoor activities, adventure travel and mentoring young professionals. He and his wife, LeAnn, reside in Altadena.

Jeffrey Scofield

Senior Vice President – Branch Director

(626) 204-2115 | jeffrey.scofield@rbc.com

Jeff brings more than 25 years of experience to his role as a financial advisor and branch director of the RBC Wealth Management office in Pasadena, California. He began his career in the financial services industry with Morgan Stanley in 1992, and has worked with some of the most prestigious Wall Street firms, including Bank of America/U.S. Trust and Wells Fargo Advisors.

A graduate of the University of California, Los Angeles, Jeff holds a Bachelor of Arts degree in political science. He is a lifetime Pasadena-area resident and is active in the community, having served on multiple nonprofit boards. He currently serves on the board of directors for the Boys and Girls Club of Pasadena. He also sits on the board for Education Through Music – Los Angeles, where he serves as treasurer.

Jeff resides in Altadena with his wife, Hilary, and their three children. Outside the office, Jeff is an avid tennis player and enjoys travel and sailing.

Deanna M. Clark

Senior Investment Associate

(626) 204-2125 | deanna.clark@rbc.com

Deanna has spent her entire professional career in the financial services industry. She has passed the Series 7, 9, 10, 63 and 65 exams. She also holds insurance licenses for life and health and variable annuities. Deanna is a two-time recipient of RBC Wealth Management's Award of Excellence for her exceptional contributions and exemplary client service. She holds a Bachelor of Science degree in sociology from Santa Clara University, where she attended on a softball scholarship.

Deanna is very athletic and enjoys coaching softball, running and water skiing. She and her husband, Mike, have two daughters and reside in Claremont.

