

Biography of Bryan Kocen



Bryan Kocen is a finance professional who spearheads The Kocen Financial Group, an investment advisory firm based in Rancho Mirage, California. As the firm's president, he manages over \$170 million in assets, providing specialized services in investment management and estate planning. His work extends beyond the financial sector, as he is deeply involved in community leadership, particularly in Jewish philanthropy and the Boy Scouts of America.

He established The Kocen Financial Group in 1991 with a vision to create financial strategies tailored to the individual needs of his clients. The firm has grown nationally recognized for its retirement planning, tax strategies, and business finance expertise. He prides himself on

cultivating lasting relationships with his clients, which often extend across generations, ensuring their financial well-being through personalized service.

Previously, he served as Chief Financial Officer at F Cubed LLC, a company at the forefront of DNA detection technology. His financial structuring, budgeting, and regulatory compliance expertise proved invaluable there. His guidance has helped numerous clients navigate prosperous and challenging economic times, focusing on wealth preservation and growth.

His personalized service distinguishes Bryan's approach to financial advisory. He understands that each client's financial situation and goals are unique. Whether working with young families on education savings plans or guiding business owners on expansion strategies, his consultations are always precisely tailored to meet their individual needs—his philosophy centers on building strong, informed relationships that underpin successful financial planning.

His commitment to community involvement is highlighted by his extensive volunteer work with the Boy Scouts of America, where he has held several leadership roles, including a term as President of the California Inland Empire Council. His contributions have been instrumental in shaping the development of young leaders.

In addition to his work with the Boy Scouts, he has been an active member of the Jewish community for nearly three decades. He has held several board positions and has been deeply involved in supporting Jewish education and culture, including significant efforts with Pardes in Jerusalem. In 2023, he commissioned a Torah in memory of his late wife, demonstrating his deep commitment to his faith and community.

Bryan holds an MBA focused on Finance and Strategy from the University of Chicago Graduate School of Business and graduated magna cum laude from Union College with a degree in Managerial Economics. He has also shared his knowledge as an adjunct professor at The College of the Desert.

Outside of his professional and philanthropic endeavors, Bryan enjoys hiking, traveling, and exploring diverse cultures, which enrich his personal and professional life.

Bryan Kocen's career exemplifies how professional expertise in finance can be effectively combined with a strong commitment to community service, making a lasting impact on his clients and the wider community.