Morgan Stanley

PRIVATE WEALTH MANAGEMENT

Private Wealth Management

Morgan Stanley Private Wealth Management combines the vast resources of a global financial services firm with the individualized services of an investment boutique to address the planning, governance, liability management and investing needs of ultra high net worth individuals and families, their businesses, and their philanthropic enterprises. Focused exclusively on those with $20+ million in investable assets, our Private Wealth Advisor Teams are dedicated to helping you preserve and grow your financial, family and social capital so it can have the greatest positive impact today and for generations to come.

Drawing on a deep understanding of your financial life, your Private Wealth Advisor Team can help you:

- Manage investments with an unwavering focus on your financial strategy and personal goals
- Create comprehensive, multigenerational wealth management plans based on your needs and challenges, and the values that guide your life and legacy
- Simplify your finances to help you achieve clarity and control

PRIVATE WEALTH MANAGEMENT HIGHLIGHTS

Established in **1977**, providing over **45** years of servicing the world's most sophisticated individuals and families.

Approximately **300** teams in more than **55** regional offices in key metropolitan areas.

Focusing exclusively on ultra high net worth individuals and families with **$20+** million in investable assets.

Dedicated to delivering an exceptional, high-touch service experience.

Private Wealth Management oversees over **$836** billion in assets.[1]

Generally co-located with institutional businesses for strong connectivity to other parts of the firm.

A CUSTOMIZED APPROACH

1 Discovery Process

2 Formulation of Tax, Trust and Estate Strategy

3 Creation of a Customized Strategic Asset Allocation

4 Integration of Tactical Asset Allocation

5 Implementation of a Customized Investment Strategy

6 Ongoing Assessment of Wealth Management Needs

Focused Resources

1. WEALTH PLANNING AND INVESTMENT MANAGEMENT.
Your Private Wealth Advisor can help you align your family and financial goals, accessing an extraordinary range of services to design and implement sophisticated investment and risk management strategies.

2. MORGAN STANLEY GLOBAL INVESTMENT OFFICE.
Our specialized team provides deep analytic support to help develop customized investment strategies; these include strategic asset allocation across legal entities, tactical asset allocation based on market developments, manager selection, portfolio construction and ongoing review.

3. TAX AND ESTATE PLANNING.
Wealth and Estate Planning Strategists can perform an integrated analysis of your balance sheet, estate plan and investment strategy. They can help you address your long-term goals while looking to enhance after-tax investment returns.

4. FAMILY GOVERNANCE AND WEALTH EDUCATION.
Our specialists can help you address sensitive family issues, facilitate communication and achieve a shared sense of direction.

5. LIFESTYLE ADVISORY.[2]
Our platform offers preferred access to carefully selected vendors to manage your lifestyle and enhance your enjoyment of life. These include entertainment, aircraft advisory and private health care advisory, as well as home staffing and personal security.

6. PHILANTHROPY MANAGEMENT.
Provides strategic advisory solutions that can help you achieve your philanthropic goals.

7. CASH MANAGEMENT AND LENDING.
Your Private Wealth Advisor can help develop personalized approaches to cash flow and liquidity management, and provide access to experienced professionals who can help craft credit solutions to address a broad range of borrowing needs.

8. EDUCATIONAL PROGRAMS.
Unique client experiences like our women's summit, senior management roundtables and NextGen gatherings provide an opportunity to enrich your understanding of key issues facing affluent families, network with your peers and learn from experts from within and outside the firm.

9. ONLINE AND MOBILE SERVICES.
Morgan Stanley Online and the Morgan Stanley Mobile App are optimized to enhance the advisor client relationship.

[1] PWM Finance as of March 31, 2024

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